

CIPD

*Championing better
work and working lives*

Intermediate level Specification Learning and Development

Regulated Qualifications Framework (RQF)

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Key information

Qualification objective

Intermediate qualifications develop knowledge and understanding of different HR models and practices, and the external factors that impact on organisations. They are suited to individuals who:

- seek to develop a career in learning and development
- are working in the field of L&D and need to extend their knowledge and skills
- have responsibility for implementing L&D policies and strategies
- need to understand the role of L&D in the wider organisational and environmental context.

Total qualification time

Total Qualification Time (TQT) is the number of hours it is estimated that a candidate will take to complete a qualification from start to finish and includes guided learning hours, self study, preparation and assessment.

Assessment

Candidates are assessed via a range of assessment methods to ensure that all the learning outcomes and assessment criteria are met in a way that enhances their learning experience. The assessments will allow candidates to demonstrate a clear grasp of the concepts and their ability to link theory to practice and to communicate clearly in the L&D field at the appropriate level. Although a variety of assessment methods may be used, the demands made on candidates within and between centres must be comparable to ensure consistency of assessment.

All unit assessment criteria are summatively assessed. Formative assessment is also encouraged within each unit. Assessment methods may include:

- assignments
- case studies
- integrated work activities
- group and individual presentations
- projects
- reports
- time constrained tests
- examinations
- Viva Voce

Competency-based assessment may also be used in centres that are approved for this method of assessment and have assessors that are occupationally competent.

Centres may choose activities from the CIPD Assessment Bank or design their own. Where a centre devises its own assessments, these must be approved by the CIPD before use.

All centre-marked assessments are subject to external verification to ensure that standards are judged comparatively against internal and external benchmarks.

Credit transfer, exemptions, and recognition of prior learning

CIPD encourages the recognition of previous achievements of candidates. Credit transfer, exemptions, and recognition of prior learning play an important part in this by supporting candidate progression.

During the initial diagnostic interview with candidates any credit transfer, exemption and RPL opportunities should be discussed and the appropriate evidence collected.

Credit transfer

Credit transfer is the process of using credits awarded in the context of one of the CIPD Level 3 Foundation, Level 5 Intermediate or Level 7 Advanced qualifications or other RQF qualification towards the achievement requirements of another CIPD qualification of the same level/type.

Exemption

Exemption is defined as the facility for a candidate to claim exemption from some of the achievement requirements of a CIPD qualification, using evidence of certificated achievement which does not fall within the definition of credit transfer but is deemed by the CIPD to be of equivalent level, content and value.

This means that candidates who have certificated achievements which do not fall within the definition of a credit transfer, as described above, can claim exemption from units/modules within CIPD qualifications that are deemed by CIPD to be of equal level, content and value.

Recognition of prior learning (RPL)

Where candidates do not have prior certificated achievements but do have some non-formal or informal learning, they may seek recognition of prior learning (RPL). We define RPL as a method of assessment, leading to the award of credit that considers whether a candidate can demonstrate that they can meet the assessment requirements for a unit/module through knowledge, understanding and skills they already possess and do not need to develop through a course of learning.

Progression opportunities

CIPD has 3 sizes of qualification, Awards, Certificates, and Diplomas. Candidates can widen their knowledge further by undertaking more units at any time.

On completion of the CIPD Level 5 Award in Learning and Development (6-12 credits), candidates can progress their studies by undertaking further units and gaining more credits to achieve a CIPD Level 5 Certificate in Learning and Development (30 credits) or a CIPD Level 5 Diploma in Learning and Development (42 credits).

Candidates can also progress their studies further by undertaking the CIPD Advanced Level qualifications.

Rules of combination for CIPD awarded¹ Level 5* Intermediate qualifications in Learning and Development

¹ CIPD awarded qualifications are offered at centres with no qualification awarding powers

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

List of units for Level 5 Intermediate Award, Certificate and Diploma in Learning and Development

Core units	Unit code	Credit value	Guided learning hours
Developing Professional Practice in Learning and Development	5LDP	6	30
Understanding the Context of Learning and Development	5CLD	6	30
Using Information, Metrics and Developing Business Cases for Learning and Development	5DBC	6	30

Optional units	Unit code	Credit value	Guided learning hours
Designing and Developing Digital and Blended Learning Solutions	5DBS	6	30
Enhancing Participant Engagement in the Learning Process	5PEL	6	30
Using Facilitation Skills	5UFS	6	30
Implementing Coaching and Mentoring	5ICM	6	30
Developing and Using Consultancy Skills	5CNS	6	30
Managing the Learning and Development Business Function	5LBF	6	30
Managing Learning and Development Suppliers	5LDS	6	30
Facilitating Collective and Social Learning	5CSL	6	30
Understanding Organisation Development	5UOD	6	30
Understanding the Role of Learning and Development in Talent Development	5LTD	6	30
Developing Leadership and Management Skills	5LMS	6	30
Developing and Delivering Learning and Development Solutions for International Markets	5LDI	6	30
Evaluating Learning and Development in a Knowledge Economy	5ELD	6	30

Rules of combination for CIPD awarded qualifications:

Level 5 Award in Learning and Development = 6 to 12 credits and a TQT of between 60 and 120 hours.

- Free choice of units from both tables above to a minimum of 6 credits and a maximum of 12 credits

Level 5 Certificate in Learning and Development = 30 credits and a TQT of 300 hours

- Take all core units to a total of 18 credits
- Choose two optional units to a total of 12 credits

Level 5 Diploma in Learning and Development = 42 credits and a TQT of 420 hours

- Take all core units to a total of 18 credits
- Choose four optional units to a total of 24 credits

Rules of combination for CIPD approved¹ Level 5* Intermediate qualifications in Learning and Development

¹ CIPD approved qualifications are offered at centres with qualification awarding powers, e.g. university awards and university validated awards

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

List of units for Level 5 Intermediate Certificate and Diploma in Learning and Development

Core units	Unit code	Credit value	Guided learning hours
Developing Professional Practice in Learning and Development	5LDP	6	30
Understanding the Context of Learning and Development	5CLD	6	30
Using Information, Metrics and Developing Business Cases for Learning and Development	5DBC	6	30

Optional units	Unit code	Credit value	Guided learning hours
Designing and Developing Digital and Blended Learning Solutions	5DBS	6	30
Enhancing Participant Engagement in the Learning Process	5PEL	6	30
Using Facilitation Skills	5UFS	6	30
Implementing Coaching and Mentoring	5ICM	6	30
Developing and Using Consultancy Skills	5CNS	6	30
Managing the Learning and Development Business Function	5LBF	6	30
Managing Learning and Development Suppliers	5LDS	6	30
Facilitating Collective and Social Learning	5CSL	6	30
Understanding Organisation Development	5UOD	6	30
Understanding the Role of Learning and Development in Talent Development	5LTD	6	30
Developing Learning and Development Skills	5LMS	6	30
Developing and Delivering Learning and Development Solutions for International Markets	5LDI	6	30
Evaluating Learning and Development in a Knowledge Economy	5ELD	6	30

Rules of combination for CIPD approved qualifications:

Level 5 Certificate in Learning and Development (equivalent to 30 credits/150 guided learning hours (glh))

- map to learning outcomes from all core units (equating to 18 credits/130 glh)
- map to learning outcomes from whole optional units (equating to a minimum of 12 credits/60 glh), units chosen must form a coherent programme
- a maximum of 10 credits (50 glh) can be delivered and assessed at RQF Level 4¹
- the remainder of credits/glh must be delivered and assessed at RQF Levels 5¹ and 6¹

Level 5 Diploma in Learning and Development (equivalent to 42 credits/210 glh)

- map to learning outcomes from all core units (equating to 18 credits/130 glh)
- map to learning outcomes from whole optional units (equating to a minimum of 24 credits/120 glh from optional units), units chosen must form a coherent programme
- a maximum of 14 credits (70 glh) can be delivered and assessed at RQF Level 4²
- the remainder of credits/glh must be delivered and assessed at RQF Levels 5² and 6²

Developing Professional Practice in Learning and Development

Unit title	Developing Professional Practice in Learning and Development
Level	5*
Credit value	6
Unit code	5LDP
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The role of the learning and development (L&D) function is changing due to a number of factors, including paradigm shifts in learning, advances in our understanding of how people learn, new technologies, business strategies and the emergence of new roles for L&D professionals. The aim of this core unit is to familiarise the learners with current trends and practices in L&D and to enable them to develop a sound and comprehensive understanding of the core knowledge, skills and behaviours required by L&D professionals, whatever their role. Current trends and practices in L&D will be examined along with a consideration of a range of roles and career paths. The unit, with reference to the CIPD's Profession Map, will consider a number of the wider performance requirements, including work management, project management, creative problem-solving, teamwork and building effective professional relationships. Learners will be supported in assessing their strengths and development areas against L&D practice capabilities. They will be guided in developing the knowledge and skills required to identify development objectives, and in devising and implementing a plan for continuing professional development (CPD).

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the knowledge, skills and behaviours required of a learning and development professional.

Current trends and practices in L&D: in-house methods v external practice, e-learning, training for non-employee groups, coaching and mentoring, degree of integration between L&D processes and systems with human resource (HR) management, integration of L&D activity and business strategy, leadership and talent management, assessing the impact of L&D, economics and training spend.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to further their understanding of the nature and scope of L&D in contemporary society
- aim to develop their practice through reflection and continuous professional development techniques.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the knowledge, skills and behaviours required of a learning and development professional.
- 2 Be able to manage self and workload to deliver timely and effective learning and development services to meet client need.
- 3 Be able to work collaboratively with others, as a member of a team or working group.
- 4 Be able to apply CPD techniques to devise, implement and review a personal development plan.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Current and emerging roles in L&D: adviser, manager, specialist (e.g. digital learning, procurement, content curation, social collaboration), executive, consultant, officer administrator, training co-ordinator, performance consultant, instructional and resource designer, organisation development business partner.

Overview of knowledge, skills and behaviours required for effective role performance (with reference to appropriate literature including the CIPD Profession Map): knowledge and understanding of the learning cycle from learning needs analysis through to evaluation; how to develop a positive reputation for efficiency, service delivery, trust and reliability. What it means to be a professional: professional ethics and relevant codes of conduct; corporate social responsibility; role-modelling professional behaviours; the fundamental beliefs and philosophical assumptions that underpin professionalism, for example, an outward-looking, customer-focused, flexible, thinking-performer perspective; obligations for integrity, ethical conduct and confidentiality; handling conflict between professional principles and organisation pressures. The constituent parts of effective L&D service delivery. The customers and stakeholders for the L&D professional: determining customer expectations and priorities; exercising discretionary judgement when customer requirements compete; the stakeholder concept and its relevance for the L&D professional; the skills of creating and sustaining customer relationships; methods for securing customer feedback; valuing customer complaints as a mechanism for enhancing service performance in the future; the search for service excellence.

2 Be able to manage self and workload to deliver timely and effective learning and development services to meet client need.

Basic project management: agreeing objectives; planning and scheduling; implementing activities; control and monitoring; managing risks; review and evaluation; communicating with stakeholders.

Basic self-management and organisation techniques: organising work; setting and managing priorities; optimising personal productivity while also sustaining positive people relationships; methods for coping with difficult people-related situations; the prevention and control of stress.

Problem-solving: problem identification and analysis, considering and deciding on options, developing, implementing and evaluating a plan to address the problem; the process will require analytical and critical thinking: situational analysis; decision-making; exercising judgement about the validity and reliability of information; how to question and interpret 'evidence' within problem situations.

3 Be able to work collaboratively with others, as a member of a team or working group.

Working with others: elements of group dynamics; the skills of collaboration and conflict resolution. The components of effective and ineffective teams: the roles required for effective group/team operation; productive, proactive and positive leadership within groups and teams. Formal and semi-formal meetings: the principles of effective membership at meetings; techniques of chairmanship and group leadership. Techniques for influence, persuasion and negotiating: securing the willing co-operation of others; assertiveness and related skills.

Managing relationships within and across hierarchies: coping with functional conflicts, stereotypes and 'political' tensions. Building and sustaining positive relationships inside and outside the L&D function: the fundamentals of interpersonal effectiveness; the benefits of networking; managing key relationships up the hierarchy; methods for coping with difficult people-related situations.

Communication skills for the L&D professional: planning and delivering presentations; report-writing; the effective applications of technology as a communication aid.

4 Be able to apply CPD techniques to devise, implement and review a personal development plan.

Continuing professional development: the basic assumptions for CPD, predicated on personal responsibility for learning, development and continuous improvement. The rationale for CPD: reflective practice; the need for continuous learning in a turbulent, transformational world; obligations for CPD; implications of the commitment to lifelong and self-managed learning.

Options for professional development: self-appraisal and the acquisition of knowledge about perceived performance: sources of information about personal effectiveness.

The design of a meaningful personal development plan: the specification of meaningful, achievable, time-bounded yet stretching development goals and objectives; types of learning activity (linked to own learning-style preferences). The circularity of personal development: plan-performance-review-plan; monitoring CPD progress through, for example, review of CPD log entries and, where appropriate, the implementation of remedial action programmes; sustaining the motivational momentum.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the knowledge, skills and behaviours required of a learning and development professional.	1.1 Summarise current practices, trends and emerging roles in learning and development (L&D). 1.2 Identify the key knowledge, skills and behaviours required by learning and development professionals.
2 Be able to manage self and workload to deliver timely and effective learning and development services to meet client need.	2.1 Apply project and self-management techniques to work activities. 2.2 Apply techniques for analysing and resolving problems.
3 Be able to work collaboratively with others, as a member of a team or working group.	3.1 Explain the concept of group dynamics. 3.2 Discuss political behaviour in organisations and how this can impact on the achievement of organisation and L&D objectives. 3.3 Apply different methods for influencing, persuading and negotiating with others.
4 Be able to apply CPD techniques to devise, implement and review a personal development plan.	4.1 Undertake a self-assessment of L&D capabilities to identify development needs. 4.2 Select a justified option for professional development. 4.3 Produce a plan to meet development objectives. 4.4 Reflect on performance against the CPD plan, identifying any further learning needs and revise the plan accordingly.

Learning resources for unit 5LDP

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 FRIEDMAN, A. (2013) *Continued professional development: lifelong learning of millions*. London: Routledge.
- 3 GALLAGHER, K. (2013) *Skills development for business and management students: study and employability*. 2nd ed. Oxford: Oxford University Press.
- 4 HORN, R. (2009) *The business skills handbook*. London: Chartered Institute of Personnel and Development.
- 5 JOHNS, T. and PERKINS, G. (2016) Developing professional practice. In: S. TAYLOR and C. WOODHAMS (eds) *Studying human resource management*. 2nd ed. London: Chartered Institute of Personnel and Development.
- 6 MEGGINSON, D. and WHITAKER, V. (2007) *Continuing professional development*. 2nd ed. London: Chartered Institute of Personnel and Development.
- 7 PEDLER, M., BURGOYNE, J. and BOYDELL, T. (2013) *A manager's guide to self-development*. 6th ed. Maidenhead: McGraw-Hill.
- 8 STEWART, J. and RIGG, C. (2011) *Learning and talent development*. London: Chartered Institute of Personnel and Development.
- 9 WINSTANLEY, D. (2005) *Personal effectiveness: a guide to action*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at: www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Understanding the Context of Learning and Development

Unit title	Understanding the Context of Learning and Development
Level	5*
Credit value	6
Unit code	5CLD
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to enable learners to know, understand and analyse a range of factors which form the context of learning and development (L&D) practice. These factors include those internal and external to any given organisation which have an influence on L&D policy and practice. The unit develops understanding of and ability to identify and analyse the relevance and impact of specific factors within particular and varying contexts. Thus the unit explores a range of generic factors with potential relevance and then examines processes for analysing these in a range of contexts to identify and determine relevance and impact in any given context. Learners will then be able to position L&D policies and activities to support achievement of the strategic aims of organisations in a variety of contexts.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to extend their knowledge of different organisational contexts
- aim to develop their understanding of the role of L&D in the wider, organisational and environmental context.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the nature of organising and managing in a variety of contexts.
- 2 Be able to analyse the key factors influencing achievement of strategic objectives in varying organisation contexts and their impact on learning and development policies and practice.
- 3 Understand how to develop learning and development policies and activities to respond to and exploit the limitations and opportunities arising from varying contextual factors.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the nature of organising and managing in a variety of contexts.

Varying organisation types and contexts: e.g. private sector, public sector, not for profit; large versus small organisations; MNCs.

Fundamental theories and models of organising and managing: e.g. bureaucracy, Mintzberg's five types, contingency theory, mechanistic versus organic; organisational architecture.

Implications for L&D policy and practice: e.g. numbers of employees and range and types of occupations/jobs; resource availability and constraints; cultural mix of employee populations; hierarchical relationships; responsibilities and accountabilities for L&D.

2 Be able to analyse the key factors influencing achievement of strategic objectives in varying organisation contexts and their impact on L&D policy and practice.

Organisation type and context – key internal factors: e.g. size, structure, culture, strategy, products and services, ownership, current performance; implications of these internal factors for L&D policy and practice e.g. current performance v target performance may require L&D solutions.

Key external factors: e.g. globalisation, markets, customers, competitors, funders, government, statutory and regulatory agencies, national funding and regulatory frameworks, pressure groups; implications of these factors for L&D policy and practice e.g. availability of funding for learning programmes; government emphasis on apprenticeships ('trailblazers').

Analytical tools: e.g. PESTLE, SWOT, McKinsey 7 S Framework, stakeholder analysis. Relevance of factors and impact on L&D policy and practice e.g. identification of learning solutions for identified weaknesses where appropriate.

3 Understand how to develop L&D policies and practice to respond to and exploit the limitations and opportunities arising from varying contextual factors.

Role of L&D in assisting organisations to achieve objectives: contribution strategic alignment (vertical and horizontal integration, strategy development), identifying learning needs; providing L&D solutions – upskilling the workforce, coaching and mentoring, contribution to the 'bottom line' by having a more skilled and effective workforce; organisation reputation e.g. investors in people; contribution to a learning organisation culture; ethics and the role of L&D.

Policy formulation process: role of stakeholders in the process; applying results of analytical tools; gaining support for L&D policy; implementing and communicating L&D policy.

Content of L&D policy statements: e.g. roles and accountabilities, funding and resourcing, use of different methods and approaches, application to different hierarchical levels and occupations/jobs, L&D records and rights of access, review procedures.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the nature of organising and managing in a variety of contexts.	1.1 Explain the similarities and differences of different types of organisations. 1.2 Evaluate the implications of varying organisation types for learning and development policy and practice.
2 Be able to analyse the key factors influencing achievement of strategic objectives in varying organisation contexts and their impact on learning and development policy and practice.	2.1 Assess a range of internal and external factors that can influence the achievement of organisation objectives. 2.2 Apply a range of analytical techniques to determine the relevance and impact of influencing factors in a variety of organisation contexts.
3 Understand how to develop learning and development policies and practice to respond to and exploit the limitations and opportunities arising from varying contextual factors.	3.1 Explain how the learning and development function helps to achieve organisational objectives. 3.2 Discuss the process of developing learning and development policy and practice. 3.3 Formulate learning and development policies to respond to the impact of relevant influencing factors.

Learning resources for unit 5CLD

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 BUTLER, M. and ROSE, E. (2011) *Introduction to organisational behaviour*. London: Chartered Institute of Personnel and Development.
- 3 GOLD, J., HOLDEN, R., ILES, P., STEWART, J. and BEARDWELL, J. (eds) (2013) *Human resource development: theory and practice*. 2nd ed. Basingstoke: Palgrave Macmillan.
- 4 HUCZYNSKI, A.A. and BUCHANAN, D.A. (2013) *Organizational behaviour*. 8th ed. Harlow: Pearson Education. (Forthcoming, 9th ed., Aug 2016.)
- 5 MCGUIRE, D. (2014) *Human resource development*. 2nd ed. London: Sage Publications.
- 6 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating learning and development*. London: Chartered Institute of Personnel and Development.
- 7 STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals

- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 4 *European Journal of Training and Development*
- 5 *Advances in Developing Human Resources*

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2013) CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 <http://skillsfundingagency.bis.gov.uk>
Website of the Skills Funding Agency
- 4 www.ufhrd.co.uk
University Forum for Human Resource Development
- 5 www.ukces.org.uk
Website of the UK Commission for Employment and Skills

Using Information, Metrics and Developing Business Cases for Learning and Development

Unit title	Using Information, Metrics and Developing Business Cases for Learning and Development
Level	5*
Credit value	6
Unit code	5DBC
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

Learning and Development (L&D) professionals need to be able to understand and use information and metrics in contemporary practice. They also need to be able to develop business cases for L&D initiatives and solutions based on valid metrics and evidence and what is considered to be good practice. This core unit develops the learners' knowledge and skills in the research process, including how to conduct critical reviews of the literature. The unit will examine how research can improve understanding, aid decision-making and provide the basis for a change in practice. They will develop their skills in identifying and reviewing data sources, analysing the findings, drawing conclusions and making recommendations for L&D practice. They will also develop skills in preparing a business report for an L&D solution.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to develop their knowledge, understanding and use of metrics in L&D
- aim to develop their knowledge and skills in the research process and their confidence in making a business case for an L&D solution.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Know how to scrutinise appropriate learning and development data.
- 2 Be able to conduct small-scale research in an area of learning and development to support a business case.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Know how to scrutinise appropriate learning and development data.

Metrics: different ways of classifying metrics e.g. quantitative, qualitative, prognosed, input-process-output metrics; examples of metrics e.g. training spend, training recipients, time spent training, L&D staff, evaluation costs, trends in L&D.

Sources of information: Sources of UK and international information relating to L&D and management practice, including online databases and search facilities, academic and professional journals, professional and regulatory bodies and sector skills councils reports, organisational policy and financial accounts, industry reports; differences in the presentation of data across a range of written, electronic and oral media. The conversion of raw data into meaningful L&D and management information. Differences between primary and secondary data and methods for obtaining data; critical reviews of the literature.

2 Be able to conduct small-scale research in an area of learning and development to support a business case.

Research: The nature of research; the stages of the research process; characteristics of research-mindedness. Different paradigms in research, for example positivism, naturalism. Different methods of data collection and their relative merits e.g. interviews, questionnaires, observation, measurement. Identifying researchable areas in L&D; formulating research questions in L&D; sampling methods in research. Ethical research practice. Analysis and interpretation of trends, patterns and metrics; evaluation of data collected to develop understanding and inform the conclusions and recommendations in a business case; limitations of small-scale research.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Know how to scrutinise appropriate learning and development data.	1.1 Identify the key metrics which measure and inform learning and development practice. 1.2 Evaluate a range of primary and secondary learning and development data sources.
2 Be able to conduct small-scale research in an area of learning and development to support a business case.	2.1 Identify a researchable area of learning and development practice. 2.2 Conduct the research, justifying the approach adopted. 2.3 Analyse the research findings. 2.4 Draw conclusions and explain how the data analysis has informed these. 2.5 Assess the limitations of the research conducted. 2.6 Articulate recommendations suitable for inclusion in a business report.

Learning resources for unit 5DBC

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 ANDERSON, V. (2013) *Research methods in human resource management: investigating a business issue*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 CAMERON, S. and PRICE, D. (2009) *Business research methods: a practical approach*. London: Chartered Institute of Personnel and Development.
- 3 EASTERBY-SMITH, M., THORPE, R. and JACKSON, P. (2015) *Management and business research*. 5th ed. London: Sage.
- 4 FINK, A. (2014) *Conducting research literature reviews: from the internet to paper*. 4th ed. London: Sage.
- 5 GAMBLES, J. (2009) *Making the business case: proposals that succeed for projects that work*. Farnham: Gower.
- 6 HORN, R. (2009) *The business skills handbook*. London: Chartered Institute of Personnel and Development.
- 7 HORN, R. (2012) *Researching and writing dissertations: a complete guide for business and management students*. 2nd ed. London: Chartered Institute of Personnel and Development.
- 8 PHELPS, B. (2004) *Smart business metrics: measure what really counts*. London: Pearson.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 4 *Journal of Business Research*

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 2 THE SUNDAY TIMES. *The Sunday Times* 100 Best Companies. Available at: www.thesundaytimes.co.uk/best100companies

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 www.ukces.org.uk
Website of the UK Commission for Employment and Skills
- 4 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development
- 5 www.gov.uk/government/organisations/departmentforbusiness-innovation-skills
Department for Business, Innovation and Skills

Designing and Developing Digital and Blended Learning Solutions

Unit title	Designing and Developing Digital and Blended Learning Solutions
Level	5*
Credit value	6
Unit code	5DBS
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to equip learning professionals with the knowledge and skills needed to take advantage of the opportunities afforded by advances in technology. While it could be seen that technology does no more than open up another channel for the delivery of existing solutions, the capability and versatility of this channel is profound, providing opportunities for improved flexibility, accessibility and scalability. This unit will prepare learning professionals to make informed choices from a host of new media options and to integrate digital delivery in powerful ways alongside more traditional approaches.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- are looking to specialise in the design of digital learning solutions and aim to obtain a broader perspective of the issues involved
- aim to become better informed about the issues associated with the application of new learning technologies.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand current digital technologies and their contribution to learning and development solutions.
- 2 Be able to design blended learning solutions that make appropriate use of new technologies alongside more traditional approaches.
- 3 Know about the processes involved in designing and developing digital learning content efficiently and what makes for engaging and effective digital learning content.
- 4 Understand the issues involved in the successful implementation of digital and blended learning solutions.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand current digital technologies and their contribution to learning and development solutions.

Current digital technologies: An overview of the possibilities afforded by technology: the evolution of learning media; the wide range of technologies now available and likely to emerge in the future; the opportunities for scalability and accessibility afforded by digital learning content; the impact of mobile devices; the possibilities for collaborative learning using social media; the impact of learning technologies so far.

Assessing a learning requirement: The information needed to assess a learning requirement; the implications that this information has to the decisions to be made about the use of technology.

2 Be able to design blended learning solutions that make appropriate use of new technologies alongside more traditional approaches.

The phases in an effective, 'end to end' learning intervention; alternative social contexts and strategies for learning; the role of learning media in determining the scalability, flexibility and efficiency of a blend; the advantages and disadvantages of face-to-face and online delivery.

3 Know about the processes involved in designing and developing digital learning content efficiently and what makes for engaging and effective digital learning content.

The various forms of digital content: from online video to self-paced e-learning; the applications for self-paced learning, performance support and classroom delivery.

Alternative processes for the design and development of digital content and their advantages and disadvantages; the roles involved and whether these should be in-house or bought-in; the tools needed to develop content.

The factors that make digital learning content engaging and effective e.g. tapping into passions, making connections to the learner's world.

4 Understand the issues involved in the successful implementation of digital and blended learning solutions.

Platforms for delivery of digital and blended learning solutions, including learning management systems, virtual learning environments and web conferencing systems.

The roles and skills required to effectively delivery and support digital and blended solutions, including virtual classroom facilitators and online tutors.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand current digital technologies and their contribution to learning and development solutions.	1.1 Summarise the range of currently available learning technologies. 1.2 Critically assess a learning requirement to determine the contribution that could be made through the use of learning technologies.
2 Be able to design blended learning solutions that make appropriate use of new technologies alongside more traditional approaches.	2.1 Structure a blended solution to meet the underlying need. 2.2 Critically assess each element of the solution to determine the most appropriate and effective media choices.
3 Know about the processes involved in designing and developing digital learning content efficiently and what makes for engaging and effective digital learning content.	3.1 Summarise the various forms of digital learning content and the applications of each. 3.2 Critically assess the roles, tools and processes needed to design and develop digital learning content efficiently. 3.3 Evaluate examples of digital learning content in terms of their likely effectiveness.
4 Understand the issues involved in the successful implementation of digital and blended learning solutions.	4.1 Distinguish between the software platforms needed to support the delivery of digital and blended solutions and assess their relative merits for different situations. 4.2 Critically assess the roles, tools and processes needed to deliver and support digital and blended learning solutions.

Learning resources for unit 5DBS

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 ALLEN, M. *Michael Allen's guide to e-learning: building interactive, fun, and effective learning programs for any company*. 2nd ed. Hoboken, NJ: Wiley. (Forthcoming, May 2016.)
- 2 CHRISTOPHER, D. (2015) *The successful virtual classroom: how to design and facilitate interactive and engaging live online learning*. New York: Amacom.
- 3 CLARK, R.C. and MAYER, R.E. (2016) *E-learning and the science of instruction: proven guidelines for consumers and designers of multimedia learning*. 4th ed. Hoboken: John Wiley.
- 4 HOFMANN, J. (2004) *Live and online!: tips, techniques, and ready-to-use activities for the virtual classroom*. San Francisco, CA: Pfeiffer.
- 5 HUBBARD, R. (2013) *The really useful e-learning instruction manual*. Hoboken, NJ: Wiley.
- 6 PALLOFF, R.M. and PRATT, K. (2013) *Lessons from the virtual classroom: the realities of online teaching*. 2nd ed. San Francisco, CA: Jossey Bass.
- 7 SHANK, P. (ed.) (2007) *The online learning idea book: volume 1: 95 proven ways to enhance technology-based and blended learning*. San Francisco, CA: Pfeiffer.
- 8 SHANK, P. (ed.) (2011) *The online learning idea book: volume 2: proven ways to enhance technology-based and blended learning*. San Francisco, CA: Pfeiffer.
- 9 SHEPHERD, C. (2012) *Digital learning content: a designer's guide*. Chesterfield: Onlignment.
- 10 SHEPHERD, C. (2015) *More than blended learning: designing world-class learning interventions*. [-]: Lulu Press.
- 11 SHEPHERD, C. (2012) *Transforming learning and development*. Chesterfield: Onlignment.
- 12 SHEPHERD, C., GREEN, P. and SAMPSON, B. (2011) *Live online learning: a facilitator's guide*. Chesterfield: Onlignment.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 <http://wenger-trayner.com/resources/>
Consultants' website that also provides a range of resources for social learning

Enhancing Participant Engagement in the Learning Process

Unit title	Enhancing Participant Engagement in the Learning Process
Level	5*
Credit value	6
Unit code	5PEL
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

This purpose of this unit is to further develop the learners' knowledge and understanding of how to maximise participant engagement throughout the learning process. Classical and contemporary theories and models from psychology will be explored and their usefulness for learning and development (L&D) practice will be assessed. In particular, the unit will examine the neuroscience and psychology of motivation, learning and change and how these can be used to inform practice. The unit will develop the learners' ability to plan, manage and deliver learning that meets the needs of learners and stakeholders, underpinned by relevant psychological theories and research. The concept of a 'holistic learning journey' will be explored along with the implications for L&D practice.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D.
- aim to further their understanding of the science of participant engagement with reference to psychological theories and models.
- aim to further their expertise in enhancing participant engagement in the learning process.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Be able to use stakeholder analysis to inform their learning activities.
- 2 Understand motivation theory as it relates to the learning process.
- 3 Be able to use neuroscience and psychology to enhance engagement throughout the learning process.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Be able to use stakeholder analysis to inform their learning activities.

Stakeholder mapping tools: e.g. power/influence vs interest grids, power/dynamism matrices, problem-frame stakeholder maps.

Sources of power and influence: e.g. definitive stakeholders such as employers and investors; stakeholder positions, interests, personality types.

2 Understand motivation theory as it relates to the learning process.

Motivation theories: e.g. McClelland's need for achievement theory, Vroom's expectancy theory, Herzberg's motivators and hygiene factor theory, Alderfer's ERG theory, Rock's SCARF model; intrinsic and extrinsic motivation; contribution of positive psychology.

Application and critique of theories: provision of examples of how different theories can be used to underpin L&D practice including the design and delivery of L&D solutions.

3 Be able to use neuroscience and psychology to enhance engagement throughout the learning process.

Key concepts and topics from neuroscience: self-directed neuroplasticity and habit, neural networks and connections, pre-frontal cortex and learning, memory – sensory, short (working memory) and long term potentiation, gathering information and the sensory cortices, reflection and the temporal lobe, active testing by engaging the motor cortex; social brain, emotion and rational brain and relationship with learning, multimodal/multisensory learning; brain friendly learning state – relaxed alertness; brain-based learning design principles.

Individual & group psychology: e.g. individual learning preferences, nature of groups/group learning methods; stages in the group process and implications for L&D practice.

Using neuroscience and psychology in practice: e.g. using an experiential learning approach, finding out what learners already know, using stories, analogies, metaphors and anchoring structures, using group work and problem-based learning, creating the right mixture of security and stimulus, avoiding cognitive overload, using well-designed visual aids and other learning resources effectively, using gamification, contracting with adult learners and how to support a holistic learning journey; using practical tools for evaluating learner engagement.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Be able to use stakeholder analysis to inform their learning activities.	1.1 Develop a stakeholder map for their learning environment. 1.2 Assess different stakeholders' power, positions and interests.
2 Understand motivation theory as it relates to the learning process.	2.1 Critically assess a number of motivation theories. 2.2 Demonstrate how motivation theory can be used to build and maintain learner engagement.
3 Be able to use neuroscience and psychology to enhance engagement throughout the learning process.	3.1 Outline the neuroscience most pertinent to learner engagement. 3.2 Explain the individual and group psychology most pertinent to learner engagement. 3.3 Provide examples of learning and development practice underpinned by psychology and neuroscience.

Learning resources for unit SPEL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 COLLINS, S. (2015) *Neuroscience for learning and development: how to apply neuroscience and psychology for improved learning and training*. London: Kogan Page.
- 2 DIRKSEN, J. (2015) *Design for how people learn*. 2nd ed. Berkeley, CA: New Riders.
- 3 HENDEL-GILLER, R. et al (2010) *The neuroscience of learning: a new paradigm for corporate education*. St Louis, MO: The Maritz Institute. Available at: <http://www.themaritzinstitute.com/perspectives/-/media/files/maritzinstitute/white-papers/the-neuroscience-of-learning-the-maritz-institute.pdf> [Accessed 29 March 2016]
- 4 NOLEN-HOEKSEMA, S. et al (2009) *Atkinson & Hilgard's introduction to psychology*. 16th ed. Andover: Cengage Learning EMEA.
- 5 PINK, D. H. (2011) *Drive: the surprising truth about what motivates us*. Edinburgh: Canongate Books.
- 6 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.
- 7 TUCKMAN, B.W. and MONETTI, D.M. (2011) *Education psychology*. Wadsworth: Cengage Learning.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Helping people learn [online resource]*. Factsheet. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/factsheets/helping-people-learn.aspx> [Accessed 29 March 2016]
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Learning styles and the psychology of learning [online resource]*. Factsheet. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/factsheets/learning-styles-psychology-learning.aspx> [Accessed 29 March 2016]
- 3 MCLEOD, S.A. (2010, rev. 2013) *Kolb – learning styles*. Available at: www.simplypsychology.org/learning-kolb.html [Accessed 29 March 2016]
- 4 VORHAUSER-SMITH, S. (2011) *The neuroscience of learning and development: crystallising potential*. PageUp People. Available at: www.pageuppeople.com/wp-content/uploads/2012/06/Neuroscience-of-Learning-and-Development1.pdf [Accessed 29 March 2016]

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 <http://www.cipd.co.uk/hr-topics/learning-development.aspx>
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 www.stakeholdermap.com
Website for stakeholder mapping information
- 4 <https://www.td.org/>
Website of the Association for Talent Development

Using Facilitation Skills

Unit title	Using Facilitation Skills
Level	5*
Credit value	6
Unit code	5UFS
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

Facilitation skills are one of the most important set of skills for learning and development (L&D) professionals. This unit will further develop the learners' knowledge and expertise in using a range of facilitation skills in different professional contexts including both business and learning contexts. Different models of facilitation will be explored plus coverage of an extensive range of tools and techniques that can be used to facilitate effectively in learning and business contexts. Learners will be able to further develop their expertise in using warm ups and closure techniques, facilitating experiential learning, facilitating meetings effectively, facilitating group learning, reaching consensus when groups are faced with alternatives, observing and interpreting behaviour, managing conflict and challenging behaviours. Learners will also be encouraged to reflect on their own facilitation skills and plan for improvements based on a model of reflective practice.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to further their knowledge and understanding of models of facilitation and different tools and techniques
- aim to develop their repertoire of facilitation skills in business and learning contexts.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the nature of facilitation and the principles of effective facilitation.
- 2 Know about different facilitation models and techniques.
- 3 Be able to use different facilitation techniques in different business and learning contexts.
- 4 Be able to reflect on own facilitation skills and plan to improve future practice.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the nature of facilitation and the principles of effective facilitation.

Conceptual nature of facilitation: the activity of contributing to the fulfilment of a need or furtherance of an effort or purpose; process for enabling change; facilitator – someone who helps a group of people understand their common objectives and assists them to plan to achieve them without taking a particular position in the discussion. Contrast with other concepts e.g. learning, training, counselling, coaching, mentoring and supervision. Outcomes of facilitation – changes in understanding and practice, reciprocal feedback, increased autonomy and independence.

Importance in business and learning contexts: Business – contributing to strategic planning, project management, team building, running a meeting/committee/working party, conferences/workshops, addressing dysfunctional behaviours; Learning – using experiential methodologies, face-to-face and digitally, opening, questioning, enabling critical reflection and transfer of learning, closure.

Critical attributes for effective facilitation: genuine mutual respect; a partnership in learning; a dynamic, goal-orientated process; and critical reflection; qualities of an effective facilitator – genuineness/realness, trust and acceptance, caring and empathy.

2 Know about different facilitation models and techniques.

Different models: Carl Rogers' humanistic model, John Heron's 6 category intervention model, Philip Burnard's model for facilitation using experiential learning and experiential learning taxonomy, Casey, Roberts and Salaman's model for facilitating group learning.

Different facilitation techniques: formulating ground rules, using ice-breakers and warm ups e.g. names, trust, physical, breathing and vocal, feelings, action/interaction; experiential learning methods e.g. gaming, improvisation and role play, simulation, sculpting; closure techniques e.g. de-roling, relaxation, guided focus, symbolic feedback, movement, diaries, rituals. Facilitation tools in a business context e.g. roundtable discussions, customer windows, affinity diagrams, knowledge 'cafes', tools to reach consensus – multivoting, criterion-based analyses of different propositions, nominal group techniques. Dealing with disruptions and dysfunctional behaviour in groups e.g. process observations, making a 'bargain', referring to ground rules and/or modifying ground rules.

3 Be able to use different facilitation techniques in different business and learning contexts.

Using facilitation techniques: skills sessions in using facilitation techniques.

4 Be able to reflect on own facilitation skills and plan to improve future practice.

Model of reflective practice: e.g. Schon, Johns' model of structured reflection, Boud, Keogh & Walker; 6 stages in Gibbs' reflective cycle applied to L&D practice; self-improvement plans.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the nature of facilitation and the principles of effective facilitation.	1.1 Discuss the meaning of facilitation and its importance in business and learning contexts. 1.2 Explain the critical attributes for effective facilitation.
2 Know about different facilitation models and techniques.	2.1 Critically evaluate different facilitation models. 2.2 Explain the nature and purpose of different facilitation techniques suitable for use in business and learning contexts.
3 Be able to use different facilitation techniques in different business and learning contexts.	3.1 Demonstrate different facilitation skills appropriate to a business context. 3.2 Demonstrate different facilitation skills appropriate to a learning and development context.
4 Be able to reflect on own facilitation skills and plan to improve future practice.	4.1 Reflect on the efficacy of own facilitation skills. 4.2 Develop a plan to improve own facilitation skills.

Learning resources for unit 5UFS

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- GARNER, E. (2012) *Facilitation skills: empowering groups to grow*. London: Bookboon.com. Available at: <http://bookboon.com/en/facilitation-skills-ebook>
- GARNER, E. (2012) *Teambuilding: how to turn uncohesive groups into productive teams*. London: Bookboon.com. Available at: <http://bookboon.com/en/teambuilding-ebook>
- HERON, J. (1999) *The complete facilitator's handbook*. London: Kogan Page.
- JENNINGS, S. (2010) *Creative drama in groupwork*. 2nd ed. London: Speechmark.
- KOLB, J.A. (2014) *Small group facilitation: improving process and performance in groups and teams*. Amherst, MA: HRD Press.
- MANN, T. (2007) *Facilitation – an art, science, skill or all three?* Bradford: Resource Productions.
- MANN, T. (2007) *Facilitation – a manual of models, tools and techniques for effective group working*. Bradford: Resource Productions.
- MCCAIN, D.V. (2015) *Facilitation basics*. 2nd ed. Alexandria, VA: ATD Press.
- MOON, J.A. (2004) *A handbook of reflective and experiential learning: theory and practice*. Abingdon: Routledge Falmer.
- SCHWARZ, R. (2002) *The skilled facilitator: a comprehensive resource for consultants, facilitators, managers, trainers and coaches*. 2nd ed. San Francisco: Jossey Bass.

- UNGER, R., NUNNALLY, B. and WILLIS, D. (2013) *Designing the conversation: techniques for successful facilitation*. San Francisco: New Riders.

Key journals

- Group Facilitation: A Research and Applications Journal* Available at: <http://iaf-world.org/index/ToolsResources/IAFJournal.aspx>
- Human Resource Development International* Available at: www.cipd.co.uk/journals
- Human Resource Development Quarterly* Available at: www.cipd.co.uk/journals
- International Journal of Training and Development* Available at: www.cipd.co.uk/journals

Online resources

- CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- www.ahrd.org
Website of the Academy of Human Resource Development
- www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Implementing Coaching and Mentoring

Unit title	Implementing Coaching and Mentoring
Level	5*
Credit value	6
Unit code	5ICM
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to develop the learners' understanding of both coaching and mentoring and of the potential value of both practices within organisations. The unit will also provide opportunities for the learners to enhance their coaching and mentoring skills. The unit begins by exploring and differentiating between the concepts of coaching and mentoring. The benefits for different stakeholders including the coach/coachee and mentor/mentee will be explored. The unit goes on to look at different models of implementing coaching and mentoring in organisations, the role of line managers in both the practices and the factors that all need to consider before implementation. The unit provides the learners with guidance on how they can support the implementation of coaching and mentoring activity in organisations.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to further their understanding of coaching and mentoring and related concepts
- aim to develop their ability to introduce coaching and mentoring into an organisation and contribute to the development of a coaching and mentoring culture.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the nature, purpose and benefits of coaching and mentoring in organisations.
- 2 Understand the different ways coaching and mentoring can be implemented in organisations.
- 3 Be able to support the implementation of coaching and/or mentoring programmes within an organisation.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the nature, purpose and benefits of coaching and mentoring in organisations.

Concepts of coaching and mentoring: history; different definitions; theories and models; directive and non-directive approaches. Similarities and differences: aims of intervention; relationship between parties; locus of control/responsibility; styles of interaction; frequency and types of meeting/interaction; formality/informality of process; coach/mentor expertise; content of meetings/activities; examples of coaching and mentoring techniques.

Benefits for different stakeholders: coach/mentee – work-related/performance benefits; personal benefits; career benefits; direct learning and skills development; enhanced self-management and learning skills; social/networking and building of contacts.

Coach/mentor – personal development; improved working relationships; performance benefits; insights into work issues; partnership approaches to work.

Organisation – coaching practice directly linked to individual/team/organisational objectives; impact on employee skills and knowledge base; impact on employee loyalty and commitment; changing workplace cultures; role of coaching and mentoring in bringing about and consolidating change; sharing and disseminating learning and enhanced organisational knowledge.

2 Understand the different ways coaching and mentoring can be implemented in organisations.

Different types of coaching and mentoring: performance, executive, career, life, peer, line manager coaching; traditional mentoring; on-line mentoring; peer/group mentoring.

Role of line managers: advantages and disadvantages of line-manager as coach/mentor; line-manager support needs; line manager capability requirements; the extent to which managers adopt or are encouraged to adopt a coaching style; extent to which managers identify and support staff development needs and career aspirations staff; conflicts of interest, fairness and objectivity issues.

3 Be able to support the implementation of coaching and/or mentoring programmes within an organisation.

Factors to be considered when implementing coaching and/or mentoring: clear reasons for implementation; alignment and potential fit with organisational values, objectives, structure and culture; relation to/integration with wider learning and development (L&D) strategy and existing L&D initiatives; roles and who will fill them, for example internal or external coaches; degree of intervention required; role of HR; selection/allocation processes and equal opportunities; issues of diversity in relation to coaching and mentoring; financial implications; availability/development of support systems.

Making recommendations and providing support: making recommendations based on an assessment of the strengths and weaknesses of existing programmes; providing advice and support on policy development; systems and processes and documentation; training of coaches and mentors, implementation, monitoring and evaluation of coaching and mentoring and measuring return on investment (ROI).

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the nature, purpose and benefits of coaching and mentoring in organisations.	1.1 Differentiate between the concepts of coaching and mentoring. 1.2 Assess the benefits of coaching and mentoring for different stakeholders in organisations.
2 Understand the different ways coaching and mentoring can be implemented in organisations	2.1 Assess the different types of coaching and mentoring that can be implemented within organisations. 2.2 Evaluate the role of line managers within coaching and mentoring.
3 Be able to support the implementation of coaching and/or mentoring programmes within an organisation.	3.1 Assess the factors which need to be considered when implementing coaching and mentoring in organisations. 3.2 Make justified recommendations for how coaching and mentoring activities could be developed and implemented. 3.3 Contribute to the development of coaching and mentoring in an organisational context.

Learning resources for unit 5ICM

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 ANDERSON, V., RAYNER, C. and SCHYNS, B. (2009) *Coaching at the sharp end: the role of line managers in coaching at work*. London: Chartered Institute of Personnel and Development. Available at: <http://www.cipd.co.uk/hr-resources/database-search.asp>
- 2 BEEVERS, K. and REA, A. *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development. (Forthcoming, May 2016.)
- 3 BLAKEY, J. and DAY, I. (2012) *Challenging coaching: going beyond traditional coaching to face the FACTS*. London: Nicholas Brealey Publishing.
- 4 CLUTTERBUCK, D. (2014) *Everyone needs a mentor*. 5th ed. London: Chartered Institute of Personnel and Development.
- 5 CLUTTERBUCK, D., MEGGINSON, D. and BAJER, A. *Building and sustaining a coaching culture*. London: Chartered Institute of Personnel and Development. (Forthcoming, June 2016.)
- 6 CONNOR, M.P. and POKORA, J.B. (2012) *Coaching and mentoring at work: developing effective practice*. 2nd ed. Maidenhead: Open University Press.
- 7 COX, E. (2013) *Coaching understood: a pragmatic enquiry into the coaching process*. London: Sage Publications.
- 8 COX, E., BACHKIROVA, T. and CLUTTERBUCK, D.A. (2014) *The complete handbook of coaching*. 2nd ed. London: Sage Publications.
- 9 DOWNEY, M. (2014) *Effective modern coaching: the principles and art of successful business coaching*. London: LID Publishing.
- 10 FLAHERTY, J. (2010) *Coaching: evoking excellence in others*. 3rd ed. Abingdon: Routledge.
- 11 GARVEY, B., STOKES, P. and MEGGINSON, D. (2014) *Coaching and mentoring: theory and practice*. 2nd ed. London: Sage Publications.
- 12 KAY, D. and HINDS, R. (2012) *A practical guide to mentoring: using coaching and mentoring skills to help others achieve their goals*. 5th ed. Oxford: How To Books
- 13 KNIGHTS, A. and POPPLETON, A. (2008) *Developing coaching capability in organisations*. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/database-search.asp>
- 14 PARSLOE, E. and LEEDHAM, M. (2009) *Coaching and mentoring: practical conversations to improve learning*. 2nd ed. London: Kogan Page.
- 15 PELTIER, B. (2010) *The psychology of executive coaching: theory and application*. 2nd ed. Hove: Routledge.
- 16 WHITMORE, J. (2009) *Coaching for performance: growing human potential and purpose – the principles and practice of coaching and leadership*. 4th ed. London: Nicholas Brealey Publishing.

Key journals

- 1 *Coaching at Work*
- 2 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 3 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 4 *Human Resource Development Review*
Available at: www.cipd.co.uk/journals
- 5 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 6 *Training and Development*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. *Coaching and mentoring*. Factsheet. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/factsheets/coaching-mentoring.aspx>
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. *Coaching: the evidence base*. Research report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/research/coaching-evidence-base.aspx>
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2008) *Coaching and buying coaching services*. 2nd ed. Guide. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/a-z/>
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2009) *Coaching at the sharp end: developing and supporting the line manager as coach*. Practical tool. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/a-z/>
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2008) *Developing coaching capability: how to design effective coaching systems in organisations*. Practical tool. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/practical-tools/design-effective-coaching-systems-organisations.aspx>
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2009) *Taking the temperature of coaching [online]*. Survey report. London: CIPD.

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 www.emccouncil.org
Website of the European Mentoring and Coaching Council
- 4 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development
- 5 www.associationforcoaching.com
Website of the Association for Coaching

Developing and Using Consultancy Skills

Unit title	Developing and Using Consultancy Skills
Level	5*
Credit value	6
Unit code	5CNS
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

In the current world of economic change and uncertainty, the need for consulting skills and abilities has increased, along with the need for businesses in private and public sectors to procure the most cost-effective and innovative solutions for business problems and/or opportunities. This unit will further develop the learners' understanding of the nature of consultancy and related concepts, different consultancy roles and the key stages in the consulting process. The unit will explore the range of skills and techniques required to be effective in a learning and development consulting role for each stage of the consulting process i.e. from working with clients to address a business need, agreeing a solution through to evaluation and closure. At the end of the unit, it is expected that they will be better able and more confident in providing customised learning and development solutions to meet the needs of different clients. Negotiating the deliverables in a consultancy contract will also be addressed in the unit.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to develop their skills in consultancy
- aim to market their consultancy portfolio.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the meaning of consultancy and the common stages in the consulting process in a learning and development context.
- 2 Know how to work with a client to agree a learning and development solution.
- 3 Be able to support a client whilst implementing a learning and development solution.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the meaning of consultancy and the common stages in the consulting process in a learning and development context.

Definition and examples of consultancy: usually an expert who provides professional advice and/or professional services in a given field; theories and models relating to consultancy e.g. Lundberg, Ulrich; differences between internal and external consultants and the advantages and disadvantages of each; different consultancy areas e.g. L&D, HR, engineering, IT, marketing, performance management, medicine; consultancy firms; nature and content of consultancy agreements; consultancy in different contexts e.g. public, private, non-governmental organisations; ethical considerations and consultancy.

Common stages in the consulting process: defining the business need before proceeding; clarifying expectations and reaching agreement; gathering and analysing information on the defined problem and/or business opportunity; recommending options/solutions/change from alternatives; leading sustainable change; taking stock or closing.

2 Know how to work with a client to agree a learning and development solution.

Identifying the business need: identifying the problem, causality, effects on the business and teams and individuals, identifying the risks to the business; identifying business opportunities with the client; gathering information about the need/opportunity as required e.g. interviews with stakeholders (internal and external), focus groups, attending meetings in a participant or non-participant mode, reviewing key documents e.g. business reports, financial reports, staff survey reports, triangulation.

Justifying a costed solution: normally in a written report form with an advocated solution from alternatives showing how solution best meets the business needs, direct and indirect costs, resources, timeframes, risk assessment results and risk mitigation recommendations, success criteria in terms of expected outcomes and outputs, monitoring and evaluation plan.

3 Be able to support a client whilst implementing and evaluating a learning and development solution.

Process for reporting on progress: agreement about purpose and frequency of meetings and mode of reporting e.g. verbal, PowerPoint slides, written reports, balance of informal v formal reports.

Reporting on the solution and recommending future action: examples of different reporting formats and use of a logframe methodology to capture inputs, outcomes and outputs with quantitative and qualitative information; making recommendations for future action to ensure embeddedness and sustainability of solution; consultancy contract closure or renewal.

Common problems with client-consultant relationships: ineffective communication about how the consultancy project will proceed; unrealistic expectations of project success or expectations too low in terms of business need; underestimating scope and/or complexity of project; not following through on small but important details; failure to understand client requirements; strategies and tactics for preventing or minimising client-consultant problems.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the meaning of consultancy and the common stages in the consulting process in a learning and development context.	1.1 Explain the meaning of consultancy. 1.2 Compare and contrast different examples of consultancy in the business world. 1.3 Identify and explain each stage of the consultancy process.
2 Know how to work with a client to agree a learning and development solution.	2.1 Establish with a client the nature of the problem and/or opportunity to be addressed and the required outcomes. 2.2 Assess different potential solutions for meeting the required outcomes. 2.3 Recommend a costed learning and development solution.
3 Be able to support a client whilst implementing a learning and development solution.	3.1 Establish with the client the processes for reporting on progress with the learning and development solution. 3.2 Report on the outcomes of the learning and development solution. 3.3 Recommend any future actions required post-implementation to ensure sustainable change. 3.4 Discuss the causes of common problems with client-consultant relationships and ways of avoiding or addressing them.

Learning resources for unit 5CNS

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BIECH, E. (2007) *The business of consulting: the basics and beyond (CD-ROM included)*. 2nd ed. San Francisco: Wiley.
- 2 BLOCK, P. (2011) *Flawless consulting: a guide to getting your expertise used*. 3rd ed. San Francisco: Wiley.
- 3 CURETON, P. (2016) *Developing and Using Consultancy Skills (e-booklet)*. London: CIPD.
- 4 GREEN, C.H. and HOWE, A.P. (2011) *The trusted advisor fieldbook: a comprehensive toolkit for leading with trust*. Hoboken: John Wiley.
- 5 O'MAHONEY, J. and MARKHAM, C. (2013) *Management consultancy*. 2nd ed. Oxford: Oxford University Press.
- 6 SCHAFFER, R.H. (2002) *High-impact consulting: how clients and consultants can work together to achieve extraordinary results*. San Francisco: Jossey-Bass.
- 7 STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.
- 8 THOMAS, M. (2004) *High-performance consulting skills: the internal consultant's guide to value-added performance*. London: Thorogood.

Key journals

- 1 *Consulting Psychology Journal: Practice and Research*
- 2 *People Management*
Available at: www.cipd.co.uk/pm
- 3 *Human Resource Development International*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. Information page summarising CIPD resources on organisation development. Available at: www.cipd.co.uk/hr-topics/organisation-development.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 2 www.organisationdevelopment.org
A consultant's website which also provides advice and resources

Managing the Learning and Development Business Function

Unit title	Managing the Learning and Development Business Function
Level	5*
Credit value	6
Unit code	5LBF
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to equip the learners with the knowledge and skills required to manage and co-ordinate the business of learning and development (L&D). The unit will further the learners' understanding of the key purpose and objectives of the learning and development function in contemporary organisations. The unit will examine evidence on how the L&D function contributes to positive business outcomes and the change agenda in organisations. Different models of delivering L&D solutions will be examined along with a consideration of the key roles and responsibilities of the L&D manager. The unit will explore the knowledge, skills and behaviours required for different L&D job roles, especially those required to manage and co-ordinate the function effectively, L&D strategy development and the management of the L&D team.

This unit is suitable for persons who:

- are working in or seeking to develop a career in L&D
- aim to develop their understanding of the scope of the L&D function
- aim to develop the knowledge and skills required to manage and co-ordinate the L&D function in contemporary organisations.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the evolving nature, purpose and business improvement activities of the learning and development function in contemporary organisations.
- 2 Understand different models for delivering the learning and development function.
- 3 Be able to manage different aspects of the learning and development function.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the evolving nature, purpose and business improvement activities of the learning and development function in contemporary organisations.

Evolving nature of learning and development: paradigm shifts – focus from training to learning; long formal courses to ‘bite-sized learning’; face-to-face learning v learning via blended/digital solutions; increase in the body of knowledge e.g. neuroscience and learning; growth of coaching; L&D as a core business function which also contributes to organisational change; emphasis on the ‘economics of L&D’ and return on investment. Purpose of function – to develop an organisation’s workforce to improve performance, business outcomes and competitive advantage; ethics & professionalism in service delivery.

Business improvement activities: demonstrating value for money and return on investment of L&D activities; capacity and capability development; anticipating future skills requirements; supporting changes in work practices and capturing and disseminating the learning that occurs; facilitating action learning sets; using coaching and mentoring; identifying, training and supporting local line manager ‘champions’; facilitating connections between business goals and individual/team performance.

Different roles in L&D: manager, adviser, administrator, consultant, different specialists e.g. digital learning

2 Understand different models for delivering the learning and development function.

Different models: a centralised L&D function, offering L&D services to the organisation; a key account holder model with particular individuals in the L&D function responsible for linking with an organisation’s business units; a devolved model with L&D teams out in business units; a business partner model linking L&D to a central service and working closely with local managers; a shared service model, putting L&D in with other business or HR services used by the business; an outsourced model; L&D delivery models and links with organisational context.

3 Be able to manage different aspects of the learning and development function.

Key responsibilities: setting L&D strategy with short, medium and long term goals aligned to organisational goals; setting the L&D budget; influencing and shaping the change agenda; devising operational L&D plans; procuring/managing resources including external suppliers; budget management; learning needs analysis; planning for learning solutions/ensuring delivery; quality assurance; monitoring and evaluation and measurement of return on investment and expectation; management reporting.

Developing L&D operational plans: including, executive summary, L&D objectives aligned with organisational strategy, success indicators and timelines; costings; plans for monitoring and evaluation.

Team management: management concepts and management skills; team concept and how to lead, manage and motivate teams; performance management.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the evolving nature, purpose and business improvement activities of the learning and development function in contemporary organisations.	1.1 Discuss the key purposes of the learning and development function in organisations. 1.2 Identify a range of learning and development activities that can contribute to business improvement. 1.3 Compare and contrast different roles in learning and development.
2 Understand different models for delivering the learning and development function.	2.1 Critically assess the relative merits of different models for delivering the learning and development function.
3 Be able to manage different aspects of the learning and development function.	3.1 Discuss the key roles and responsibilities of learning and development managers. 3.2 Develop a coherent and costed learning and development plan. 3.3 Provide leadership, guidance and support to members of the learning and development team.

Learning resources for unit 5LBF

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 HORN, R. (2009) *The business skills handbook*. London: Chartered Institute of Personnel and Development.
- 2 NEWTON, R. (2011) *The management book: how to manage your team to deliver outstanding results*. Harlow: Pearson.
- 3 SADLER-SMITH, E. (2006) *Learning and development for managers: perspectives from research and practice*. London: Blackwell Publishing.
- 4 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating learning and development: essentials for practice*. London: Chartered Institute of Personnel and Development.
- 5 STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 4 *European Journal of Training and Development*
- 5 *Advances in Developing Human Resources*

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 <http://skillsfundingagency.bis.gov.uk>
Website of the Skills Funding Agency
- 4 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development

Managing Learning and Development Suppliers

Unit title	Managing Learning and Development Suppliers
Level	5*
Credit value	6
Unit code	5LDS
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The effective management of learning and development (L&D) suppliers can produce a number of positive benefits for organisations, including gains in productivity and customer satisfaction and reduction in time, customer dissatisfaction and costs. There are also a number of challenges in managing supplier relations successfully. This unit will explore the principles and practice of supplier management within the context of the learning and development supplier lifecycle. The role and responsibilities of the L&D manager in supplier management is a central focus of the unit. The unit will explore best practice in contract development, recruiting and appointing suppliers, strategies and tactics for working effectively with suppliers, managing supplier performance and managing any risks during the supplier lifecycle.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to develop their knowledge and understanding of the principles and practice of supplier management
- aim to further their expertise in managing suppliers.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the procurement process within the context of learning and development.
- 2 Know how to procure learning and development suppliers.
- 3 Know how to manage learning and development suppliers.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the procurement process within the context of learning and development.

Key concepts: supplier management and supplier relationship management (SRM); supply chain and supply chain management (SCM); supplier stratification; supplier lifecycle; procurement; out-sourcing v in-sourcing; logistics; product and service flow; service level agreements (SLAs) and deliverables; key performance indicators (KPIs); academic models of supply chain management and procurement.

Key procurement principles: integrity in decisions and actions relating to suppliers; ensuring value for the employer/organisation; loyalty to the L&D profession.

Role of the L&D manager in relation to suppliers: identifying need; advising and ensuring best value for the organisation; advertising and recruiting suppliers; managing suppliers; quality assurance; risk assessment and risk management; contributing to policy development.

2 Know how to procure learning and development suppliers.

Business cases for products and/or services: identifying need, identifying deliverables and timeframes, how to cost an option, risk management.

Tendering process: tenders and bids, main steps in the tender process, bid management.

Contracts: contract development; contract monitoring; assessing interim and final deliverables against expectations in the context of original and current circumstances; customer reviews; reporting on outcomes; criteria used to decide on the need for contract renewal e.g. continued organisation need for current products and services and/or new products and services aligned with organisational need.

3 Know how to manage learning and development suppliers.

Establishing professional relationships: having a clear commitment between purchaser and supplier, a clear understanding of scope of work and requirements through discussion and SLAs, agreement about key activities and ways of working to meet requirements, establishing mutual respect.

Managing supplier performance: two-way review meetings to review progress against deliverables within the SLA; gathering information relevant to the SLA e.g. getting the experiences of customers; using KPIs to assess quality of products and services; managing issues with poor performance and agreeing remedial actions; documentation and follow up.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the procurement process within the context of learning and development.	1.1 Explain the meaning of supplier management and related concepts. 1.2 Justify a number of key principles relating to the procurement of suppliers. 1.3 Summarise the role of the learning and development manager in purchasing and supply.
2 Know how to procure learning and development suppliers.	2.1 Develop a business case for the products and/or services required. 2.2 Explain the tendering and bid management process. 2.3 Develop supplier contracts which meet the specification of need.
3 Know how to manage learning and development suppliers.	3.1 Discuss ways of establishing and maintaining professional relationships with suppliers. 3.2 Justify different ways of managing the performance of learning and development suppliers.

Learning resources for unit 5LDS

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BAILY, P., FARMER, D., CROCKER, B., JESSOP, D. and JONES, D. (2015) *Procurement, principles and management*. 11th ed. Harlow: Pearson Education.
- 2 BALL, D. (2005) *Managing suppliers and partners for the academic library*. London: Facet.
- 3 EMMETT, S. (2012) *Quick guide: supplier relationship management in the supply chain*. Cambridge: Cambridge Academic.
- 4 EMMETT, S. and CROCKER, B. (2009) *Excellence in supplier management: how to better manage contracts with suppliers and add value*. Cambridge: Cambridge Academic.
- 5 GORDON, S.R. (2008) *Supplier evaluation and performance excellence: a guide to meaningful metrics and successful results*. Fort Lauderdale, FL: J. Ross Publishing.
- 6 O'BRIEN, J. (2014) *Supplier relationship management: unlocking the hidden value in your supply base*. London: Kogan Page.
- 7 TAYLOR, S., GANESHAN, R. and MAGAZINE, M. (eds) (1998) *Quantitative models for supply chain management*. Norwell, MA: Kluwer Academic Publications.
- 8 WINSTANLEY, D. (2005) *Personal effectiveness: a guide to action*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Facilitating Collective and Social Learning

Unit title	Facilitating Collective and Social Learning
Level	5*
Credit value	6
Unit code	5CSL
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to develop the learners' understanding of both collective and social learning and the nature and impact of both within the workplace. The unit begins by exploring the constructs of collective and social learning, their differences and any overlap. The unit then explores different models of collective and social learning, with a focus on how these feed into organisational learning objectives. The rapidly changing face of social media tools and e-learning technologies are explored and the implications these have for learners, facilitators, line managers and organisations. Finally, the unit considers the benefits and challenges of facilitating collective and social learning for contributing to an organisational learning agenda.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in learning and development (L&D)
- are working in the field of L&D and need to extend knowledge and skills of collective and social learning
- aim to adopt collective and social learning approaches in their work.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the constructs of collective and social learning.
- 2 Know about different models of collective and social learning and their application within the workplace.
- 3 Understand how technology has transformed the nature and shape of collective and social learning.
- 4 Understand the benefits and challenges of facilitating collective and social learning in organisations.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the constructs of collective and social learning.

Constructs of collective & social learning: Definitions, interpretations, differences and overlaps between collective and social learning; shift from individual learning theory to collective and social learning theory; how individual learning theory can be used to inform understanding of collective and social learning.

Group learning: Group theory and its contribution to understanding the collective/social dynamics of group learning; differences, similarities etc. between group learning, collective learning, collaborative learning, cooperative learning, social learning, team learning and fit with collective and social learning.

2 Know about different models of collective and social learning and their application within the workplace.

Key models: e.g. systems model of team learning (Dechant et al, 1993), phase model of group learning (Kasl et al (1993), cooperative, collaborative, transformative group learning (Cranton, 1996), 70:20:10 framework (Jennings, 2013), 5Rs of Social learning (Hart, 2014); descriptive 'scientific' versus prescriptive 'commercial' models of collective, social and organisational learning.

Development, manifestations and uses: formal, informal, can occur in work, at work or away from work (Sambrook, 2006); off-the-job, structured, informal/accidental, intentional/structured (Vaughan, 2008), learning groups e.g. formal structured/informal emergent/opportunity driven. Uses at work e.g. fostering connections, collaboration, knowledge sharing & building collective intelligence, establishing work teams/communities of practice/social networks (Jarche, 2012).

3 Understand how technology has transformed the nature and shape of collective and social learning.

Technology & types of social tools: e.g. Twitter, You Tube, Google Docs, Skype, WordPress, Dropbox, Prez1, Moodle, Slideshare, Facebook, LinkedIn, Webinars etc. with examples of their use and impact; open source tools v user-generated/open content; role of L&D professional as a social learning practitioner.

Contribution to organisational learning objectives: Online communities in the workplace (design, delivery, support). Connected learning activities (online social learning workshops, Enterprise Social Network, backchannel learning, live discussions, tiny training/micro-learning, pop-up learning, social mentoring. Social collaboration e.g. Berg's collaboration pyramid, 2012.

4 Understand the benefits and challenges of facilitating collective and social learning in organisations.

Collective and social learning & organisational objectives: e.g. development of a 'communication culture', impact of team learning, and communities of practice on organisational learning.

Factors to be considered when implementing collective and social learning: clarity of purpose; alignment and potential fit with organisational values, objectives, structure and culture; relation to/integration with wider learning and development (L&D) strategy and existing L&D initiatives; roles and who will fill them; technology what/ when/ where/ availability/development of support systems/role of HR; financial implications. Challenges for implementation e.g. share/hoard dilemma (Hislop 2013, Andolšek 2011).

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the constructs of collective and social learning.	1.1 Differentiate between the constructs of collective and social learning. 1.2 Distinguish between group learning, co-operative and collaborative learning and how these fit within collective and social learning.
2 Know about different models of collective and social learning and their application within the workplace.	2.1 Compare different models of collective and social learning. 2.2 Describe the development of collective and social learning and their manifestations and uses in the workplace.
3 Understand how technology has transformed the nature and shape of collective and social learning.	3.1 Identify key current social media and e-learning tools and technologies and their application. 3.2 Explore how social media and e-learning can be employed by various groups to meet organisational learning objectives.
4 Understand the benefits and challenges of facilitating collective and social learning in organisations.	4.1 Explain how collective and social learning can contribute to organisational learning and the achievement of organisational objectives. 4.2 Assess the factors to be considered when implementing collective and social learning programmes in organisations.

Learning resources for unit 5CSL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 GIBB, S. (2011) *Human resource development*. London: Palgrave MacMillan.
- 2 HART, J. and JARCHE, H. (2014) *Social learning handbook: the next generation of learning practices in the age of knowledge sharing and collaboration*. England: Lulu.com. Available at: <http://c4lpt.co.uk/social-learning-handbook-2014>
- 3 ILLERIS, K. (2011) *The fundamentals of workplace learning: understanding how people learn in working life*. London: Routledge.
- 4 LAVE, J. and WENGER, E. (1991) *Situated learning: legitimate peripheral participation*. New York: Cambridge University Press.
- 5 SADLER-SMITH, E. (2006) *Learning and development for managers: perspectives from research and practice*. London: Blackwell Publishing.
- 6 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating learning and development: essentials for practice*. London: Chartered Institute of Personnel and Development.
- 7 WENGER-TRAYNOR, E., FENTON-O'CREEVY, M., HUTCHINSON, S., KUBIAK, C. and WENGER-TRAYNOR, B. (eds.) *Learning in landscapes of practice: boundaries, identity, and knowledgeability in practice-based learning*. (2014) Abingdon: Routledge.

Key journals

- 1 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 2 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 3 SAMBROOK, S.A. (2003) *E-learning in small organisations*. Education and Training. Vol 45, No 8/9. pp506–16. Available for purchase at: <http://www.emeraldinsight.com/doi/abs/10.1108/00400910310508892>

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 www.wenger-trayner.com/resources/
Consultants' website that also provides resources for social learning and communities of practice.

Understanding Organisation Development

Unit title	Understanding Organisation Development
Level	5*
Credit value	6
Unit code	5UOD
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to enable learners to know, understand and analyse the concept of organisation development (OD). It will develop their knowledge and understanding of the evolution of OD in contemporary organisations and its role in contributing to major organisational change. Learners will gain a knowledge and understanding of different models of OD and the common processes involved. Understanding of the knowledge, skills and behaviours required to function effectively in an OD practitioner role is also a significant focus of the unit, as is the relationship of OD with learning and development (L&D).

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to further their knowledge and understanding of organisation development (OD) and organisation development roles
- aim to know more about the skill requirement for OD roles and the relationship with L&D roles.

Learning outcomes

On completion of this unit, learners will be able to:

- 1 Understand the concept and key purposes of organisation development and the relationship of organisation development with the learning and development function.
- 2 Be able to explain and evaluate a range of models of organisation development, including associated tools and techniques.
- 3 Be able to specify and describe the knowledge and skills required in an organisation development role.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Indicative unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the concept and key purposes of organisation development and the relationship of organisation development with the learning and development function.

Concept of OD: different definitions e.g. 'planned and systematic approach to enabling sustained organisation performance through the involvement of its people'; common features in definitions e.g. systemic - applies to an entire system, concerned with planned change, oriented to improving organisational effectiveness, dialogic and participative. Concept of OD in transcending functional boundaries within organisations.

Historical development of OD: from its origins in NTL in the USA and the Tavistock Clinic in the UK to contemporary focus on engagement, corporate social responsibility (CSR) and organisation trust, values and culture. Developments in the behavioural sciences and influences on OD theory and practice e.g. from sociology, psychology, theories of motivation, learning and personality. Relationship and connections of OD to HRD and to HRM.

Contribution of OD to: achieving organisational strategy and ensuring the organisation has a committed 'fit for the future' workforce, plays a vital role in ensuring organisation effectiveness, work life balance and employee satisfaction and engagement, plays a key role in change management. Tensions within achieving organisation, group and individual purposes and benefits through OD practice.

Training, learning and development contributions to OD: L&D function's role and contribution to OD programmes and interventions; e.g. awareness programmes, behavioural skill development, communication and consultation events, management development.

2 Be able to explain and evaluate a range of models of organisation development, including associated tools and techniques.

A range of models of OD: e.g. action research, leadership development, systems theory, transformational change versus incremental change, learning organisations. What OD looks like in different organisations in terms of strategy, activities, and success measures.

OD tools and techniques: e.g. T Group sensitivity training, team development, process consultation, large group interventions, survey-feedback, and tools for managing planned and organic change processes.

Critiques of OD & change management: e.g. unitary assumptions versus pluralist nature of organisations, possibility of shared values, limitations of managerial control, limitations of planning and forecasting.

3 Be able to specify and describe the knowledge, skills and behaviours required in an organisation development role.

Behavioural sciences base of OD: e.g. contributions of psychology, social psychology and anthropology; OD requires sophisticated people management skills such as consultancy skills: e.g. planning, diagnosing, contracting, intervening, and evaluating. Being client centred.

Facilitation skills: in one to one, group and team settings. Coaching and mentoring skills.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the concept and key purposes of organisation development and the relationship of organisation development with the learning and development function.	1.1 Explain the concept of organisation development within its historical and contemporary context. 1.2 Discuss a range of purposes of applying organisation development in contemporary work organisations. 1.3 Explore the relationship of organisation development practice with the learning and development function.
2 Be able to explain and evaluate a range of models of organisation development, including associated tools and techniques.	2.1 Describe a range of models of organisation development and explain tools and techniques associated with each model. 2.2 Justify the application of different models, tools and techniques to meet varying purposes.
3 Be able to specify and describe the knowledge and skills in an organisation development role.	3.1 Analyse different roles in organisation development. 3.2 Discuss the knowledge and skills required in an organisation development role.

Learning resources for unit 5UOD

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- CHEUNG-JUDGE, M. and HOLBECH, L. (2015) *Organisation development: a practitioner's guide for OD and HR*. 2nd ed. London: Kogan Page.
- CUMMINGS, T.G. and WORLEY, C.G. (2015) *Organization development and change*. 10th ed. Stamford, CT: Cengage Learning.
- FRANCIS, H., HOLBECH, L. and REDDINGTON, M. (2012) *People and organisation development: a new agenda for organisational effectiveness*. London: Chartered Institute of Personnel and Development.
- GARDEN, A. (2016) *The roles of organisation development*. Abingdon: Routledge.
- GRIFFIN, E., ALSOP, M., SAVILLE, M. and SMITH, G. (eds.) (2016) *A field guide for organisation development: taking theory into practice*. Abingdon: Routledge.
- SENGE, P. (2006) *The fifth discipline: the art & practice of the learning organization*. London: Random House Business Books.
- SENGE, P., and KLEINER, A. (2011) *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*. London: Nicholas Brearley
- STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.

Key journals

- Human Relations*
- Leadership and Organisation Development Journal*
- People Management*
Available at: www.cipd.co.uk/pm
- Personnel Review*
- Work, Employment and Society*
- Human Resource Development International*
Available at: www.cipd.co.uk/journals
- Human Resource Development Quarterly*

Online resources

- CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. Information page summarising CIPD resources on organisation development. Available at: www.cipd.co.uk/hr-topics/organisation-development.aspx
- CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR, learning and development and organisation development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- www.odnetwork.org
A website for organisation development professionals
- www.organisationdevelopment.org
A consultant's website which also provides advice and resources

Understanding the Role of Learning and Development in Talent Development

Unit title	Understanding the Role of Learning and Development in Talent Development
Level	5*
Credit value	6
Unit code	5LTD
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

Learning and development (L&D) is central to talent management through talent development. Understanding the contribution of learning and development is therefore essential for effective talent management and in achieving economic and social aspirations, ambitions and objectives of work organisations and individuals. The purpose of this unit is to enable learners to know, understand and analyse the meaning and scope of talent development in contemporary organisations. The unit will examine common purposes and processes of talent development, the contextual nature of notions of talent and the way contextual understandings of talent influence the way talent development is practiced. Various options within and ways of managing learning and talent development will be explored, as will the role of the learning and development function.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in learning and talent development
- aim to further their knowledge and understanding of L&D and of talent development
- aim to know more about the role of L&D in talent development.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the evolving meaning, nature and purpose of talent development in contemporary organisations.
- 2 Be able to explain different ways of organising and managing talent development in different contexts.
- 3 Be able to analyse the role of the learning and development function in developing talent.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the evolving meaning, nature and purpose of talent development in contemporary organisations.

The concept of talent: Talent as a construct and as an attribute; talent as potential and as high performance; universal versus context dependent meanings of talent, inclusive versus exclusive approaches.; expansion of talent management, changing context and business case for talent management. Knowledge workers, critical success factor roles and leaders as talent. Developing internal talent versus attracting external talent. Talent development and succession planning. Trends in learning and talent development e.g. different training programmes, e-learning, collective and social learning, apprenticeships, most commonly used approaches.

Defining and identifying talent: role of organisation context in determining talent, influence of varying stakeholders in that process, varying possible purposes of talent development, role of organisation context and stakeholders in determining purpose.

2 Be able to explain different ways of organising and managing talent development in different contexts.

Organising and managing talent development: identifying the objectives of talent management activities, understanding the business aims. Integrated versus separated talent development. Roles and responsibilities of senior and line managers, HR professionals and L&D specialists. Organisation-wide versus focused talent development. Inclusive versus exclusive approaches. Resources required for talent development e.g. analytical tools; talent development budget.

Influence of organisation context: Analysing and assessing the impact of contextual factors. Role of stakeholders in determining approach to organising and managing talent development. Tracking talent and talent development outcomes.

3 Be able to analyse the role of the learning and development function in developing talent.

L&D role and contributions to achieving organisation objectives: e.g. aligning L&D strategy with business strategy, ensuring learning needs are identified and met, developing capability and competence; building trust and engagement.

A range of L&D interventions: e.g. assessment and development centres, leadership development, graduate development programmes, use of coaching and mentoring, work based learning.

Learning and development function contribution: L&D role in retaining and attracting talent. Supporting senior and line managers in developing talent.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the evolving meaning, nature and purpose of talent development in contemporary organisations.	1.1 Define a range of meanings attached to the notion of talent and explain the implications of these for talent development practice. 1.2 Explore varying purposes of talent development and the influence of organisation context and key stakeholders in determining purpose.
2 Be able to explain different ways of organising and managing talent development in different contexts.	2.1 Evaluate a range of ways of organising and managing talent development. 2.2 Analyse the role and impact of contextual factors on decisions on organising and managing talent development.
3 Be able to analyse the role of the learning and development function in developing talent.	3.1 Assess the varying roles for the learning and development function in organising, managing and delivering talent development.

Learning resources for unit 5LTD

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Essential reading

- 1 CAPLAN, J. (2013) *Strategic talent development: develop and engage all your people for business success*. London: Kogan Page.
- 2 CHEUNG-JUDGE, M.Y. and HOLBECH, L. (2015) *Organization development: a practitioner's guide for OD and HR*. 2nd ed. London: Kogan Page
- 3 CLUTTERBUCK, D. (2012) *The talent wave: why succession planning fails and what to do about it*. London: Kogan Page.
- 4 GOLD, J., HOLDEN, R., ILES, P., STEWART, J. and BEARDWELL, J. (eds) (2013) *Human resource development: theory and practice*. 2nd ed. Basingstoke: Palgrave Macmillan.
- 5 LAWLER, E.E. (2008) *Talent: making people your competitive advantage*. San Francisco: Jossey-Bass.
- 6 STEWART, J. and RIGG, C. (2011) *Learning and talent development*. London: Chartered Institute of Personnel and Development.
- 7 STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A series of research and opinion papers from the CIPD specifically on all aspects of talent management and development. Available at: www.cipd.co.uk/research/_talent-forward
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR, learning and development and organisation development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals
- 2 *Human Resource Development Quarterly*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Training and Development*
Available at: www.cipd.co.uk/journals
- 4 *European Journal of Training and Development*
- 5 *Advances in Developing Human Resources*
- 6 *Personnel Review*

Developing Leadership and Management Skills

Unit title	Developing Leadership and Management Skills
Level	5*
Credit value	6
Unit code	5LMS
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

Effective leadership and management is broadly acknowledged to be essential to organisation effectiveness and success. Hence leadership and management development is a critical component of learning and development (L&D) practice. The purpose of this unit is therefore to enable learners to understand and analyse the role of L&D in leadership and management development. This will include examining differences between leadership and management. The key roles and tasks of corporate leaders and managers will be covered. The focus of the unit will then shift to the design of leadership and management development interventions. The role of the learning and development function will be explored. The unit will also include a discussion of the key principles for ensuring the success of leadership and management development programmes.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to explore the role of learning and development in developing corporate leaders and managers
- aim extend their knowledge of methods for ensuring the success of leadership and management development programmes.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the distinction between leadership and management.
- 2 Be able to explain different approaches to developing leaders and managers and the role of the learning and development function.
- 3 Understand how to ensure the ownership and success of leadership and management development programmes.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the distinction between leadership and management.

Definitions and models of management: e.g. functional models; scientific management; human relations school; strategic versus operational roles; management processes, e.g. planning; controlling; communicating; decision making; role of power and conflict resolution.

Definitions and models of leadership: e.g. trait theories; contingency theories; style theories; Leader-Member Exchange; transactional versus transformational; situational leadership; distributed leadership. Similarities and differences: e.g. management as authority and control; management functions versus leadership roles; leadership as vision and influence; managers and subordinates versus leaders and followers.

2 Be able to explain different approaches to developing leaders and managers and the role of the learning and development function.

Different approaches: Formal versus informal approaches; e.g. education based programmes, secondments, job rotation, special projects, shadow Boards, coaching and mentoring. Use of competency frameworks. Assessment and development centres. Management self-development. Links with talent management and development.

Role of the L&D function and L&D professionals: e.g. establishing needs; design and delivery of learning and development interventions; identifying and assessing potential leaders; advising on individual and group development; evaluating outcomes; justifying investment in leadership and management development.

3 Understand how to ensure the ownership and success of leadership and management development programmes.

Indicators of success: e.g. Individual performance evidence, effective succession, retention of key employees, value added indicators, participant satisfaction indicators.

Ensuring ownership: Identifying key stakeholders. Involving and ensuring contributions of key stakeholders, especially participants, top and senior managers, and non L&D professionals. Individualised interventions. Demonstrating and communicating achievement of success indicators.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the distinction between leadership and management.	1.1 Describe a range of meanings attached to the concepts of leadership and management. 1.2 Justify distinctions drawn between leadership and management.
2 Be able to explain different approaches to developing leaders and managers and the role of the learning and development function.	2.1 Evaluate a range of approaches for developing leaders and managers. 2.2 Discuss the role of the L&D function in providing leadership and management development.
3 Understand how to ensure the ownership and success of leadership and management development programmes.	3.1 Identify indicators of success for leadership and management development programmes. 3.2 Justify methods to ensure the success of leadership and management development programmes.

Learning resources for unit 5LMS

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 ADAIR, J. (2013) *Develop your leadership skills*. London: Kogan Page.
- 2 AVOLIO, B. (2011) *Full range leadership development*. 2nd ed. London: Sage.
- 3 GOLD, J., THORPE, R. and MUMFORD, A. (2010) *Leadership and management development*. 5th ed. London: Chartered Institute of Personnel and Development.
- 4 GRINT, K. (2010) *Leadership: a very short introduction*. Oxford: Oxford University Press.

Key journals

- 1 *Career Development International*
- 2 *Human Resource Management Journal*
Available at: www.cipd.co.uk/journals
- 3 *International Journal of Human Resource Management*
Available at: www.cipd.co.uk/journals
- 4 *Journal of Management Development*
- 5 *Leadership and Organisation Development Journal*
- 6 *Management Learning*
- 7 *People Management*
Available at: www.cipd.co.uk/pm
- 8 *The Leadership Quarterly*
- 9 *Human Relations*

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD factsheet on leadership. Includes content on distinguishing leadership and management. Available at: www.cipd.co.uk/hr-resources/factsheets/leadership.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD factsheet on management development. Available at: www.cipd.co.uk/hr-resources/factsheets/management-development.aspx
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR, learning and development and organisation development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Chartered Institute of Personnel and Development (CIPD)
- 3 www.leadershiptrust.net
Leadership Trust Foundation

Developing and Delivering Learning and Development Solutions for International Markets

Unit title	Developing and Delivering Learning and Development Solutions for International Markets
Level	5*
Credit value	6
Unit code	5LDI
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to develop the learners' understanding of the fundamental principles and practice of developing a learning and development (L&D) strategy and intervention within the global context, and of the potential value of these practices within globally-dispersed organisations. The unit begins by exploring the concept of learning, training and development, its interplay with cross cultural adjustment and their importance for both international organisations and global virtual teams. It then goes on to examine the range of factors that need to be considered during the process of developing an L&D strategy and intervention for the international markets before implementation. This includes the analysis of cross-cultural training needs for international managers engaged in international assignments and of the involvements of all key stakeholders. Finally, the unit examines the design, delivery and evaluation of the L&D solutions that meet international managers' needs and most importantly, match the host cultural context.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D
- aim to learn more about learning and development strategies and interventions within a global context
- aim to learn more about designing, delivering and evaluating L&D solutions internationally.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the concept of learning and development in cross-cultural settings.
- 2 Understand the range of factors that need to be considered when developing a global learning and development strategy and intervention.
- 3 Know how to design, deliver and evaluate a learning and development intervention suitable for international assignments in a timely, feasible and cost-effective way.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the concept of learning and development in cross-cultural settings.

Concepts of learning and development (L&D): history; different definitions; theories and models (behavioural, cognitive, social cultural); key writings in relation to learning and e.g. Stewart, Gold); learning styles (Coffield et al; Kolb, Armstrong; Allinson and Hayes).

Concepts of cross culture adjustment and its relevance with L&D: definitions, theories and models; cultural shock theory; expatriation theory; acculturation theory. Key writings in relation to cross cultural learning and development (e.g. Hofstede, Oberg, Black, Brislin, Gudykunst, Berry).

Importance of L&D in Multinational Corporations (MNCs): history and current debates on global virtual team; key writings e.g. Sparrow, Brewster, Burke, Maznevski and Chudoba.

2 Understand the range of factors that need to be considered when developing a global learning and development strategy and intervention.

Training needs analysis; Individual's willingness, degree of interaction required with the host culture, culture distance, personal circumstances. Key writings e.g. Tung; Mendenhall & Oddou.

Concepts of cross cultural training: definitions, theories and models (Black, Littrell et al, Mendenhall & Oddou).

Factors to be considered when implementing cross cultural training: culture distance, attribute of the job, the timing of the training, language communication, individual variable such as learning style and interaction with host culture: the attitude, the extent and the quality); family issues; trainer's quality; alignment and potential fit with organisational values, objectives, structure and local and host culture; previous international assignment experience; degree of intervention required; role of HR; selection/allocation processes and equal opportunities; issues of diversity and dual career conflicts in relation to L & D; financial implications; availability/development of support systems; measuring return on investment (ROI). Key writings (Littrell et al; Nam et al.)

3 Know how to design, deliver and evaluate a learning and development intervention suitable for international assignments in a timely, feasible and cost effective way.

Design of cross-cultural training/intercultural training: different types of training programmes based on rigor and the toughness of host culture: didactic, training, culture assimilator; language training, sensitivity training, field experience; different types of training programmes based on timing: pre-departure training; post arrival training and repatriation training (Selmer); CCT programmes based on competencies: Culture specific vs culture general; Length of the training; key stakeholders involved, that is, international manager, family and HR department. Multicultural team.

Delivery of CCT: multiple delivery strategies; timing of the delivery (Selmer); online support, update both home and host news; personalised coach for both expatriation and repatriation.

Evaluation of cross cultural training: establish success criteria, early return rates and expatriation failure; transfer of training; lost opportunity; adjustment difficulty; talent retention. Evaluate the effectiveness of CCT programme via ROI analysis; monitor expatriate's satisfaction post CCT and the overall assignment.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the concept of learning and development in cross-cultural settings.	1.1 Explain the concepts of learning and development. 1.2 Analyse different learning theories and their relevance in cross-cultural settings. 1.3 Evaluate how learning and development can play an important role for modern organisations involved with international assignments and multicultural teams.
2 Understand the range of factors that need to be considered when developing a global learning and development strategy and intervention.	2.1 Assess the range of factors that need to be considered when developing a global L&D strategy and intervention. 2.2 Discuss the involvement from different key stakeholders, including the organisation, the manager, the learner and the trainer. 2.3 Explain the process of training needs analysis for international assignments.
3 Know how to design, deliver and evaluate a learning and development intervention suitable for international assignments in a timely, feasible and cost effective way.	3.1 Justify the type of learning and development interventions chosen for an international assignment. 3.2 Discuss suitable delivering processes for learning and development interventions for international markets. 3.3 Justify the selection of monitoring and evaluation methods in terms of their suitability for international assignments.

Learning resources for unit 5LDI

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BLACK, J.S. and MENDENHALL, M. (1990) Cross-cultural training effectiveness: a review and a theoretical framework for future research. *Academy of Management Review*. Vol 15, No 1. pp113–36.
- 2 BREWSTER, C., HOULDSWORTH, E., SPARROW, P., and VERNON, G. (2016) *International human resource management*. 4th ed. London: Chartered Institute of Personnel and Development.
- 3 DOWLING, P.J., FESTING, M. and ENGLE, A. (2013) *International human resource management*. 6th ed. Andover: Cengage Learning EMEA.
- 4 FRIEDMAN, H., GLOVER, G., SIMS, E., CULHANE, E., GUEST, M. and VAN DRIEL, M. (2013) Cross-cultural competence: performance-based assessment and training. *Organization Development Journal*. Vol 31, No 2, Summer. pp18-30.
- 5 GOLD, J., HOLDEN, R., ILES, P., STEWART, J. and BEARDWELL, J. (eds.) (2013) *Human resource development: theory and practice*. 2nd ed. Basingstoke: Palgrave Macmillan.
- 6 HARZING, A.W. and PINNINGTON, A.H. (2015) *International human resource management*. 4th ed. London: Sage Publications.
- 7 ILES, P. and ZHANG, C. (2013) *International human resource management: a cross-cultural and comparative approach*. London: Chartered Institute of Personnel and Development.
- 8 LENARTOWICZ, T., JOHNSON, J.P. and KONOPASKE, R. (2014) The application of learning theories to improve cross-cultural training programs in MNCs. *International Journal of Human Resource Management*. Vol 25, No 12. pp1697-1719.
- 9 LITRELL, L.N., SALAS, E., PALYE, M. and RIEDEL, S. (2006) Expatriate preparation: a critical analysis of 25 years of cross-cultural training research. *Human Resource Development Review*. Vol 5. pp355–88.
- 10 MENDENHALL, M. and ODDOU, G. (1985) The dimensions of expatriate acculturation: a review. *Academy of Management Review*. Vol 10. pp39–48.
- 11 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.
- 12 WANKEL, C. (2016) Developing cross-cultural managerial skills through social media. *Journal of Organizational Change Management*. Vol 29, No 1. pp116-124.
- 13 WURTZ, O. (2014) An empirical investigation of the effectiveness of pre-departure and in-country cross-cultural training. *International Journal of Human Resource Management*. Vol 25, No 14. pp2088-2101.

Key journals

- 1 *Human Resource Development International*
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. Information page summarising CIPD resources on organisation development. Available at: www.cipd.co.uk/hr-topics/organisation-development.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR, learning and development and organisation development. Available at: www.cipd.co.uk/hr-resources/a-z
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. Factsheet on international mobility. Available at: www.cipd.co.uk/hr-resources/factsheets/international-mobility.aspx#link_1
- 4 THE TELEGRAPH. Article on expatriate language skills. Available at: www.telegraph.co.uk/expat/expatnews/9511398/Lack-of-language-skills-is-biggest-obstacle-for-expats.html

Websites

- 1 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 2 <http://internationalhrforum.com/2012/05/30/expatriate-orientation-why-what-when>
Website of the International HR Forum
- 3 www.expatswomen.com
Website based in Dubai which supports expat women and their families
- 4 <http://totallyexpat.com>
The forum for Expatriate Management
- 5 <http://geert-hofstede.com>
Website of the Hofstede Centre

Evaluating Learning and Development in a Knowledge Economy

Unit title	Evaluating Learning and Development in a Knowledge Economy
Level	5*
Credit value	6
Unit code	5ELD
Unit review date	September 2019

*RQF level 5, comparable to level 7 in Ireland, level 9 in Scotland and EQF level 5

Purpose and aim of unit

The purpose of this unit is to develop the learners' understanding of the evaluation of learning and development (L&D) within a business and knowledge economy. The unit begins by exploring the importance for evaluating learning within the organisation. Various typologies are evaluated and contrasted from the more traditional to the more contemporary. The process of evaluating L&D is explored from various overarching approaches through to the specifics of the 'who, what, where and how'. The challenge of valuing knowledge, learning and development is discussed and key methods currently employed by organisations such as 'Return on Investment' (ROI) are described and explained. With the move from the service economy to the knowledge economy, how knowledge management strategy can maximise the value of L&D within an organisation is explored.

This unit is suitable for persons who:

- are working in or seeking to develop a career in L&D
- aim to extend their knowledge and skills in evaluating L&D
- aim to further their understanding of the challenges of evaluating L&D in the wider, economic, organisational and environmental context.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the meaning and purposes of evaluation within a learning and development context.
- 2 Know about different theories, tools and techniques for evaluating learning and development activities.
- 3 Know about the challenges for evaluating learning and development within a knowledge economy.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the meaning and purposes of evaluation within a learning and development context.

Evaluation concept and purposes: Definitions of evaluation; related concepts e.g. internal validation, external validation, balanced scorecard; purposes of evaluation e.g. research/pragmatic/ political; organization learning (Sadler-Smith, 2006).

Fit with L&D processes and systems: Key steps within the L&D process; e.g. determination of objectives, strategy, planning and implementation, evaluation.

Learning transfer: meaning of transfer with workplace examples; importance for different stakeholders.

2 Know about different theories, tools and techniques for evaluating learning and development activities.

Approaches for designing evaluation tools: behavioural objectives approach, responsive evaluation, goal-free evaluation, participatory/collaborative evaluation. Key measures - learning function efficiency measures; key performance indicators and benchmark measures; return on investment measures; return on expectation measures; taxonomies; e.g. Kirkpatrick/Phillips (learning/ behaviour/ results) context-input-reaction-outcome (CIRO), return on Investment (ROI) alternatives to taxonomic approach; evaluation of reactions/ knowledge/ skills/ simulations/ attitudes/ changes in job behaviour/ results; talent analytics, learning transfer, evaluating results, benefit-cost ratio.

Key steps within the evaluation process: determining 'Why, Who, What, How' (Harrison, 1997).

Sources of data collection: qualitative versus quantitative data; tools e.g. questionnaires, feedback, focus groups; analysis (correlational/ factor etc.).

3 Know about the challenges for evaluating learning and development within a knowledge economy.

Challenges: examples of barriers for evaluating learning (Mankin 2009); evaluation versus value (and other terms such as 'best' value and 'added' value), learning versus knowledge. Metrics for valuing learning: return on investment, benchmark and capacity of L&D processes and performances, return on expectation, learning function (i.e. the efficiency and effectiveness of the learning function).

Knowledge economy: characteristics/ trends/ challenges; types of workforce in a knowledge economy e.g. less permanent, consultants, periphery workers, zero hours etc. & impact on organisational knowledge.

Intellectual capital accounting: meaning, problematizing, implications for L&D.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the meaning and purposes of evaluation within a learning and development context.	1.1 Define evaluation and identify the types and purposes of evaluation. 1.2 Explain how evaluation fits within learning and development processes and systems. 1.3 Discuss the importance of learning transfer into the workplace.
2 Know about different theories, tools and techniques for evaluating learning and development activities.	2.1 Compare and contrast key theories for evaluating learning and development activities. 2.2 Explain the key steps within the evaluation process. 2.3 Identify sources of data and methods of analysis that can be used within the evaluation process.
3 Know about the challenges for evaluating learning and development within a knowledge economy.	3.1 Consider a number of key challenges that can act as barriers to conducting the evaluation of a learning and development activity. 3.2 Explore the characteristics of a knowledge economy and their implications for evaluating learning and development activities. 3.3 Discuss the key issues raised by intellectual capital accounting.

Learning resources for unit SELD

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 ANDERSON, V. (2007) *The value of learning: A new model of value and evaluation*. London: CIPD
- 2 BEEVERS, K. and REA, A. (2013) *Learning and development practice. 2nd ed.* London: Chartered Institute of Personnel and Development.
- 3 KIRKPATRICK, D.L. and KIRKPATRICK, J.D. (2007) *Implementing the four levels: a practical guide for effective evaluation of training programmes*. San Francisco: Brett-Koehler Publishers.
- 4 SADLER-SMITH, E. (2006) *Learning and development for managers: perspectives from research and practice*. Oxford: Blackwell Publishing.
- 5 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating learning and development: essentials for practice*. London: Chartered Institute of Personnel and Development.
- 5 MATTOX, J.R. (2012) Measuring the effectiveness of informal learning methodologies. *Training and Development*. Vol 66, No 2, February. pp48–53.
- 6 MARGARYAN, A., LITTLEJOHN, A. and MILLIGAN, C. (2013) Self-regulated learning in the workplace: strategies and factors in the attainment of learning goals. *International Journal of Training and Development*. Vol 17 No 4, December. pp245–259.
- 7 PEKKAN, A., ULKU, N. and CIHANGIR, M. (2014) A theoretic study about management and measurement of intellectual capital. *Information Management and Business Review*. Vol 6 No 4, August. pp200–206.
- 8 PETTY, R. and GUTHRIE, J. (2000) Intellectual capital literature review: measurement, reporting and management. *Journal of Intellectual Capital*. Vol 1, No 2. pp155–76.
- 9 PHILLIPS, J.J. and PHILLIPS, P. (2011) Moving from evidence to proof. *Training and Development*. Vol 65, No 8, August. pp34–9.
- 10 ROSLENDER, R. and FINCHAM, R. (2004) Intellectual capital accounting in the UK: a field study perspective. *Accounting, Auditing and Accountability Journal*. Vol 17, No 2. pp178–209.
- 11 YACOVELLI, S. (2012) How to effectively evaluate e-learning. *Training and Development*. Vol 66, No 7, July. pp52–7.

Key journals

- 1 DERVEN, M. (2012) Building a strategic approach to learning evaluation. *Training and Development*. Vol 66, No 11, November. pp54–7.
- 2 FONTANA, R.P., MILLIGAN, C., LITTLEJOHN, A. and MARGARYAN, A. (2015) Measuring self-regulated learning in the workplace. *International Journal of Training and Development*. Vol 19 No 1, March. pp32–52.
- 3 GRIMALDI, M., CRICELLI, L. and ROGO, F. (2015) Assessment and management of intellectual capital: a single case study on the construction and implementation of an IC index. *Knowledge and Process Management*. Vol 22 No 4, October–December. pp235–249.
- 4 LING, Y.H. (2013) The influence of intellectual capital on organizational performance – knowledge management as moderator. *Asia Pacific Journal of Management*. Vol 30 No 3, September. pp937–964.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR, learning and development and organisation development. Available at: www.cipd.co.uk/hr-resources/a-z

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Chartered Institute of Personnel and Development (CIPD)

CIPD

Chartered Institute of Personnel and Development
151 The Broadway London SW19 1JQ United Kingdom

T +44 (0)20 8612 6200 **F** +44 (0)20 8612 6201

E cipd@cipd.co.uk **W** cipd.co.uk

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