NCFE Active IQ Level 3 Diploma in Personal Training
QN: 610/5189/5



Qualification Specification

Version 3.0 – November 2026

Qualification summary

Qualification title	**NCFE Active IQ Level 3 Diploma in Personal Training**
Ofqual qualification number (QN)	610/5189/5
Guided learning hours (GLH)	255
Total qualification time (TQT)	370
Credit value	37
Minimum age	16
Qualification purpose	This qualification aims to develop a learner's further knowledge and skills in gym instruction, to pursue a career in personal training. The role of a personal trainer is to coach clients (on a one-to-one or small group basis) towards their health and fitness goals. Personal training plays an important role in improving the health of the nation, creating opportunities to get more people, more active, more often. This qualification has been designed in partnership with employers and covers the knowledge and skills identified in the industry as essential for the personal trainer role, covering the design of exercise programmes and instruction, nutritional advice and overall lifestyle management. The qualification also provides the learner with a comprehensive understanding of business, finances, sales and marketing to enable the personal trainer to build and retain a stable client base.
Grading	Achieved/not yet achieved
Assessment method	Internally assessed and externally quality assured portfolio of evidence.
Work/industry placement experience	Work/industry placement experience is not required.
Apprenticeship standards	This qualification is linked to the following apprenticeship standard: ST0302: Personal Trainer Apprenticeship standard.
Endorsement	This qualification is endorsed by CIMSPA (Chartered Institute for the Management of Sport and Physical Activity) and is fully mapped to the CIMSPA Personal Trainer (Occupational) Professional Standard. Learners successfully completing this qualification will have met the requirements of the CIMSPA Personal Trainer (Occupational) Professional Standards and can use the qualification as evidence when applying for the relevant CIMSPA professional status.

	CIMSPA Endorsed | Professional Standards
UCAS	Please refer to the UCAS website for further details of points allocation and the most up-to-date information.
Performance points	Please check the performance points data produced by the Department for Education (DfE) and available online.
Regulation information	This is a regulated qualification. The regulated number for this qualification is 610/5189/5.
Funding	This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

Contents

Qualification summary **2**

Section 1: introduction **5**

Aims and objectives 5
Support Handbook 5
Guidance for entry and registration 5
Achieving this qualification 5
Progression 6
Progression to higher-level studies 6
Resource requirements 6
Realistic work environment (RWE) requirement/recommendation 6
How the qualification is assessed 7
Internal assessment 7

Section 2: unit content and assessment guidance **9**

Unit 01 Applied anatomy and physiology for exercise and fitness (M/651/4025) 10
Unit 02 Principles of nutrition for exercise and health (R/651/4026) 25
Unit 03 Understanding lifestyle, wellbeing and common medical conditions (T/651/4027) 33
Unit 04 Encouraging positive health and fitness behaviours (Y/651/4028) 38
Unit 05 Programme design and delivery for personal training (A/651/4029) 51
Unit 06 Professionalism and business acumen for personal trainers (H/651/4030) 64
NCFE assessment strategy 73

Section 3: explanation of terms **74**

Section 4: support **76**

Support materials 76
Other support materials 76
Reproduction of this document 76

Contact us **77**

Appendix A: units **78**

Mandatory units 78

Change history record **79**

Section 1: introduction

Centres must ensure they are using the most recent version of the Qualification Specification on the NCFE website.

Aims and objectives

This qualification aims to:

- focus on the study of the personal trainer
- offer breadth and depth of study, incorporating a key core of knowledge
- provide opportunities to acquire a number of practical and technical skills.

Support Handbook

This Qualification Specification must be used alongside the mandatory Support Handbook, which can be found on the NCFE website. This contains additional supporting information to help with planning, delivery and assessment.

This Qualification Specification contains all the qualification-specific information you will need that is not covered in the Support Handbook.

Guidance for entry and registration

This qualification is designed for gym instructors wishing to pursue a career in the health and fitness sector as personal trainers and individuals who already hold a gym instructor qualification, wishing to become employed as a personal trainer.

Registration is at the discretion of the centre in accordance with equality legislation and should be made on the NCFE Portal.

Learners wishing to undertake this qualification should have achieved a suitable level 2 qualification in gym instructing or fitness instructing. The course requires physical exertion and individual participation is essential, therefore a degree of physical fitness is necessary. There is an element of communication (discussing, presenting, reading and writing) involved and learners should have basic skills in communication pitched at level 2.

Centres are responsible for ensuring that all learners are capable of achieving the units and learning outcomes (LOs) and complying with the relevant literacy, numeracy, and health and safety requirements.

Learners registered on this qualification should not undertake another qualification at the same level, or with the same/a similar title, as duplication of learning may affect funding eligibility.

Achieving this qualification

To be awarded this qualification, learners are required to successfully achieve **6 units** from the mandatory units.

Please refer to the list of units in appendix A for further information.

To achieve this qualification, learners must successfully demonstrate their achievement of all LOs of the units as detailed in this Qualification Specification. A partial certificate may be requested for learners who do not achieve the full qualification but have achieved at least one whole unit; partial achievement certificate fees can be found in the Fees and Pricing document on the NCFE website.

Progression

Learners who achieve this qualification could progress to the following:

- further education:
  - sports massage therapy
  - adapting physical activity for antenatal and postnatal clients
  - apprenticeship in personal training.

Progression to higher-level studies

Level 3 qualifications can support progression to higher-level study, which requires knowledge and skills different from those gained at levels 1 and 2. Level 3 qualifications enable learners to:

- apply factual, procedural and theoretical subject knowledge
- use relevant knowledge and methods to address complex, non-routine problems
- interpret and evaluate relevant information and ideas
- understand the nature of the area of study or work
- demonstrate an awareness of different perspectives and approaches
- identify, select and use appropriate cognitive and practical skills
- use appropriate research to inform actions
- review and evaluate the effectiveness of their own methods

Resource requirements

There are no mandatory resource requirements for this qualification, but centres must ensure learners have access to suitable resources to enable them to cover all the appropriate LOs.

Realistic work environment (RWE) requirement/recommendation

The assessment of competence-based criteria should ideally be conducted within the workplace. However, in instances where this is not feasible, learners can be assessed in a realistic work environment (RWE) designed to replicate real work settings.

It is essential for organisations utilising an RWE to ensure it accurately reflects current and authentic work environments. By doing so, employers can be confident that competence demonstrated by a learner in an RWE will be translated into successful performance in employment.

In establishing an RWE, the following factors should be considered.

The work situation being represented is relevant to the competence requirements being assessed:

- The work situation should closely resemble the relevant setting.
- Equipment and resources that replicate the work situation must be current and available for use to ensure that assessment requirements can be met.
- Time constraints, resource access and information availability should mirror real conditions.

The learner's work activities reflect those found in the work environment being represented, for example:

- Interaction with colleagues and others should reflect expected communication approaches.
- Tasks performed must be completed to an acceptable timescale.
- Learners must be able to achieve a realistic volume of work as would be expected in the work situation being represented.
- Learners operate professionally with clear understanding of their work activities and responsibilities.
- Feedback from colleagues and others (for example, customers or service users) is maintained and acted upon.
- Account must be taken of any legislation, regulations or standard procedures that would be followed in the workplace.

How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

This qualification is internally assessed and externally quality assured.

The assessment consists of one component:

- an internally assessed portfolio of evidence, which is assessed by centre staff and externally quality assured by NCFE (internal quality assurance must still be completed by the centre as usual).

Learners must be successful in this component to gain the Level 3 Diploma in Personal Training.

Learners who are not successful can resubmit work within the registration period; however, a charge may apply in cases where additional external quality assurance visits are required.

Unless otherwise stated in this Qualification Specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

Internal assessment

Each learner must create a portfolio of evidence generated from appropriate assessment tasks to demonstrate achievement of all the LOs associated with each unit. On completion of each unit, learners must declare that the work produced is their own and the assessor must countersign this.

If a centre needs to create their own internal assessment tasks, there are four essential elements in the production of successful centre-based assessment tasks; these are:

- ensuring the assessment tasks are meaningful with clear, assessable outcomes
- appropriate coverage of the content, LOs or assessment criteria (AC)
- having a valid and engaging context or scenario
- including sufficient opportunities for stretch and challenge for higher attainers.

Section 2: unit content and assessment guidance

This section provides details of the structure and content of this qualification, including grading, level, credit and guided learning hours (GLH).

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes (LOs) are covered, and if the evidence generated can be internally and externally quality assured. For approval of methods of internal assessment other than portfolio building, please contact your external quality assurer (EQA).

The explanation of terms explains how the terms used in the unit content are applied to this qualification. This can be found in Section 3.

Unit 01 Applied anatomy and physiology for exercise and fitness (M/651/4025)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**6 credits**	**45 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Know the structure and function of the skeletal system in relation to health and fitness	1.1 Classify **types of bones** and relate their structure to function
	1.2 Identify the **main bones** and their implications for vital functions and movements
	1.3 Identify the anatomical **planes of motion** for different joint actions and exercises
	1.4 Identify the **joint actions** and typical ranges of movement of the **major joints** of the body
	1.5 Describe the **role of osteoblasts and osteoclasts** and their mechanical and hormonal contribution to bone density
	1.6 Identify the **benefits and risks** of weight-bearing exercise for the bones and joints
	1.7 Identify the long- and short-term **effects** of exercise on bones, to include osteoporosis
	1.8 Describe the **structure** and **function** of the vertebral column, including the role of the **spinal curves**
	1.9 Identify the **relationship between the structure and function** of the skeleton
	1.10 Identify **changes** to the skeletal system as clients age
2. Understand functional kinesiology and biomechanics relevant to personal training	2.1 Identify the **importance** of maintaining the correct degree of spinal curvature in relation to weightbearing and biomechanical efficiency
	2.2 Identify and give examples of the **biomechanical principles of movement**
	2.3 Describe common **postural patterns**, their associated muscle imbalances and the **problems these can cause**
	2.4 Identify the biomechanical **implications** of different centres of gravity in relation to posture and patterns of adiposity
	2.5 Identify open and closed chain kinetic movements, including examples, their advantages and disadvantages
3. Know the structure and function of the myofascial system in relation to health and fitness	3.1 Identify the three **types of muscle** in the human body including their key characteristics
	3.2 Describe the **structure and function** of skeletal muscle and connective tissue
	3.3 Identify the **stages of the sliding filament theory**
	3.4 Identify the different types of **muscular contractions**
	3.5 Identify the **structural features and characteristics** of fibre types
	3.6 Identify the **effects** of exercise intensity and duration on muscle fibre recruitment and adaptation by the different muscle fibre types
	3.7 Identify the locations of the **major muscles** of the body

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	3.8 Identify the **isolated muscle actions** responsible for producing specific body movements
	3.9 Identify the **roles of muscles** in integrated movements of the body compared to their isolated muscle actions
	3.10 Identify causative factors, symptoms and recovery strategies for delayed onset muscle soreness (DOMS)
	3.11 Identify the structure and functions of the different **types of connective tissue**
	3.12 Identify the short- and long-term **effects** of exercise on muscles
	3.13 Identify **changes** to the myofascial system as clients age
4. Know the structure and function of the cardiovascular system in relation to health and fitness	4.1 Identify the **structures** of the heart and their functions
	4.2 List the order in which **blood flows** through the cardiovascular system
	4.3 Define the **terms** related to the cardiovascular system
	4.4 Define the **cardiac cycle** and the terms **stroke volume and cardiac output**
	4.5 Identify the immediate blood pressure **response to exercise**, to include the Valsalva manoeuvre
	4.6 Describe the long-term effects of **different forms of exercise** training on blood pressure
	4.7 Identify the blood pressure classifications and associated health risks
	4.8 Identify a range of healthy **lifestyle choices** and their positive effect on cardiorespiratory systems/tissues
	4.9 Identify the **cardiovascular benefits** and **adaptations** to different forms of exercise
	4.10 Identify **changes** to the cardiovascular system as clients age
5. Know the structure and function of the respiratory system in relation to health and fitness	5.1 Identify the **structure and function** of the respiratory system
	5.2 Define the **terms** related to the respiratory system
	5.3 Describe the **relationship between the cardiovascular and respiratory systems** and how regular physical activity impacts on this
	5.4 Identify the **passage of inhaled air** from the atmosphere to the cellular level and exhaled air back through the lungs to the atmosphere
	5.5 Identify the short-term (acute) and long-term (chronic) **effects** of exercise on the respiratory system
	5.6 Identify **changes** to the respiratory system as clients age
6. Understand the role of the energy systems in relation to physical activity, exercise and training	6.1 Identify the energy substrates and by-products of **each energy system**
	6.2 Describe the **processes** by which adenosine triphosphate (ATP) is re-synthesised in each energy system
	6.3 Identify the relative contribution of each energy system to total energy expended in activities with **different characteristics**
	6.4 Identify **how to use acute variables** during training to recruit the different energy systems
	6.5 Define the terms **aerobic and anaerobic threshold**

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	6.6 Identify the **effects** of interval training and EPOC (excess post-exercise oxygen consumption) on metabolism
	6.7 Identify **how the body burns fat** through a range of intensities
	6.8 Identify the **relationship between METs (metabolic equivalent) and kilocalories**
7. Know the structure and function of the nervous system in relation to health and fitness	7.1 Identify the main **functions and roles** of the nervous system
	7.2 Describe the **components of the nervous system** and their roles in regulating body functions
	7.3 Identify the **structure and function of a neuron**
	7.4 Identify the **structure and function of a motor unit**
	7.5 Identify the 'all or nothing' law of muscle contraction and the size principle of motor unit recruitment
	7.6 Identify the **stages** in the process of the stretch reflex and inverse stretch reflex
	7.7 Identify the **structure and function of muscle spindles**
	7.8 Identify the **structure and function of Golgi tendon organs**
	7.9 Describe the **definition and function of autogenic inhibition**
	7.10 Describe the **definition and function of reciprocal inhibition**
	7.11 Identify the **neuromuscular adaptations** associated with different types of exercise and the benefits of these for performance
	7.12 Identify **changes** to the nervous system as clients age
8. Know the structure and function of the endocrine system in relation to health and fitness	8.1 Identify the **role of the endocrine system**
	8.2 Identify the location, structure and functions of the **endocrine glands** of the body
	8.3 Identify the main roles and functions of **hormones** in the body
	8.4 Identify the influences of **lifestyle factors** on **endocrine health**
	8.5 Identify hormonal responses to exercise and their **catabolic and anabolic effects**
	8.6 Describe the **relationship between exercise intensity and hormonal reactions**
9. Know how the immune system relates to exercise	9.1 Identify the **potential long-term effects** of exercise programmes on the immune system
	9.2 Describe the **open window theory** for pathogen entrance after excessive exercise
10. Understand the components of fitness	10.1 Identify the three **somatotypes** including the implications of each body type for exercise capacity and the ability to alter body shape
	10.2 Identify the **anatomical and hormonal differences** between males and females and their influence on safe, effective and appropriate physical activity

Range
1. Know the structure and function of the skeletal system in relation to health and fitness
1.1 Types of bones must include: • long • short • flat

Range

- irregular
- sesamoid.

1.2 Main bones must be identified from the following skeletal regions:

- axial skeleton
- appendicular skeleton
- upper limb
- lower limb.

Learners must cover a minimum of 12 major bones of the skeletal system overall with a minimum of 5 bones from each of the following areas of the body:

- anterior view
- posterior view.

1.3 Planes of motion must include:

- frontal plane
- sagittal plane
- transverse plane.

1.4 Joint actions must include:

- movement within anatomical planes.

Major joints must include:

- shoulder
- elbow
- wrist
- spine
- hip
- knee
- ankle.

1.5 Role of osteoblasts and osteoclasts must include:

- cellular roles:
  - bone formation
  - bone resorption
  - bone remodelling processes.

1.6 Benefits and risks must relate to:

- bone health
- joint health
- connective tissue

Range
• injury risk. **1.7 Effects** must include: • acute physiological responses to exercise • long-term skeletal adaptations • impact on bone mineral density • implications for osteoporosis risk. **1.8 Structure** must include: • cervical • thoracic • lumbar • sacral • coccygeal. **Function** must include: • shock absorption • load distribution • posture and movement. **Spinal curves** must include: • cervical lordosis • thoracic kyphosis • lumbar lordosis. **1.9 Relationship between the structure and function** must include: • support • protection • movement. **1.10 Changes** must include: • age-related skeletal adaptations • changes affecting joint function • implications for physical activity and exercise participation.
2. Understand functional kinesiology and biomechanics relevant to personal training
2.1 Importance must relate to: • maintenance of a neutral spine • distribution of load through the kinetic chain • shock absorption during movement • reduction of stress on spinal structures • injury prevention during exercise and weight-bearing activity.

Range
2.2 Biomechanical principles of movement must include: • centre of gravity • stability • momentum • inertia • alignment • torque • base of support • balance. **2.3 Postural patterns** must include: • kyphosis • lordosis • scoliosis. **Problems these can cause** must include: • potential movement dysfunction • possible injury risks. **2.4 Implications** must relate to: • posture • balance and stability • movement efficiency • distribution of body mass.
3. Know the structure and function of the myofascial system in relation to health and fitness
3.1 Types of muscle must include: • skeletal • smooth • cardiac. **3.2 Structure and function** must include: • skeletal muscle: ○ muscle fibres   ○ fascicles   ○ connective tissue layers • connective tissue: ○ structure   ○ function in movement   ○ role in joint stability. **3.3 Stages of the sliding filament theory** must include:

Range
• interaction between actin and myosin filaments • muscle contraction process • role of adenosine triphosphate (ATP) and calcium ions. **3.4 Muscular contractions** must include: • concentric • eccentric • isometric. **3.5 Structural features and characteristics** must include: • fibre characteristics • energy system use • fatigue resistance • force production. **3.6 Effects** must include: • recruitment patterns • exercise intensity • exercise duration. **3.7 Major muscles** may include: • pectoralis major • pectoralis minor • deltoid (anterior, medial, posterior) • trapezius (upper, middle, lower) • Latissimus dorsi • rhomboids • rotator cuff muscles: ○ supraspinatus   ○ infraspinatus   ○ teres minor   ○ subscapularis • teres major • serratus anterior • biceps brachii • brachialis • brachioradialis • triceps brachii • rectus abdominis • transverse abdominis • internal obliques • external obliques • erector spinae (iliocostalis, longissimus, spinalis) • multifidus

Range

- quadratus lumborum
- gluteus maximus
- gluteus medius
- gluteus minimus
- iliopsoas (iliacus + psoas major)
- tensor fasciae latae (TFL)
- quadriceps group:
  - rectus femoris
  - vastus lateralis
  - vastus medialis
  - vastus intermedius
- hamstrings:
  - biceps femoris
  - semitendinosus
  - semimembranosus
- adductors:
  - adductor longus
  - adductor brevis
  - adductor magnus
  - gracilis
- gastrocnemius
- soleus
- tibialis anterior
- fibularis (peroneals):
  - fibularis longus
  - fibularis brevis.

Learners must cover a minimum of 20 major muscles of the body overall with a minimum of 4 muscles from each the following areas of the body:

- upper body – anterior
- upper body – posterior
- lower body – anterior
- lower body – posterior.

3.8 Isolated muscle actions must include:

- major joints of the body
- corresponding muscle actions.

3.9 Roles of muscles must include:

- agonist muscles
- antagonist muscles
- synergists
- stabilisers (fixators).

Range
3.11 Types of connective tissue must include: • tendons • ligaments • cartilage. **3.12 Effects** must include: • acute muscular responses • chronic muscular adaptations. **3.13 Changes** must include: • muscle mass changes • connective tissue elasticity changes • effects on strength and flexibility.
4. Know the structure and function of the cardiovascular system in relation to health and fitness
4.1 Structures must include: • chambers • valves • blood vessels. **4.2 Blood flows** must include: • through the heart • between the heart and lungs • between the heart and the body. **4.3 Terms** must include: • HR (heart rate) • resting HR • HRmax • HR reference values for various populations • HR training zones. **4.4 Cardiac cycle** and **stroke volume and cardiac output** must include: • phases of the cardiac cycle • volume of blood pumped per beat • relationship between heart rate and cardiac output. **4.5 Response to exercise** must include: • systolic blood pressure response to exercise • diastolic blood pressure response to exercise • the Valsalva manoeuvre and its effects on blood pressure.

Range
4.6 Different forms of exercise must include: • endurance training • interval training • resistance training • relaxation training. **4.8 Lifestyle choices** must relate to: • physical activity • nutrition • smoking behaviour • alcohol consumption • stress management. **4.9 Cardiovascular benefits** must include: • cardiovascular efficiency • circulation • oxygen delivery. **Adaptations** must include: • acute responses to exercise • chronic cardiovascular adaptations. **4.10 Changes** must include: • structural changes • functional changes • implications for exercise participation.
5. Know the structure and function of the respiratory system in relation to health and fitness
5.1 Structure and function must include: • structure of the respiratory system: ○ upper respiratory tract   ○ lower respiratory tract   ○ lungs and associated structures • function: ○ ventilation   ○ gaseous exchange   ○ transport of oxygen and carbon dioxide. **5.2 Terms** must include: • ventilatory pump • pulmonary ventilation (VE) • ventilatory rate

Range

- ventilatory threshold
- maximal oxygen consumption (VO2max).

5.3 Relationship between the cardiovascular and respiratory systems must include:

- oxygen transport
- carbon dioxide removal
- circulation of blood
- gaseous exchange in the lungs.

5.4 Passage of inhaled air must include:

- the pathway of air through the respiratory system
- gaseous exchange within the lungs
- delivery of oxygen to body tissues
- removal of carbon dioxide.

5.5 Effects must include:

- ventilation
- respiratory efficiency
- oxygen uptake.

5.6 Changes must include:

- structural changes to respiratory tissues
- changes in lung capacity
- changes in respiratory efficiency.

6. Understand the role of the energy systems in relation to physical activity, exercise and training

6.1 Each energy system must include:

- phosphocreatine system
- lactate system
- aerobic system.

6.2 Processes must include:

- the role of adenosine triphosphate (ATP) in energy production
- how ATP is re-synthesised during exercise
- differences in ATP production between energy systems.

6.3 Different characteristics must include:

- intensity
- duration
- type.

Range
6.4 How to use acute variables must include: • manipulation of training intensity • manipulation of exercise duration • manipulation of recovery periods. **6.5 Aerobic and anaerobic threshold** must include: • exercise intensity • metabolic responses to exercise. **6.6 Effects** must include: • the effects of interval training on energy expenditure • the metabolic effects of EPOC following exercise. **6.7 How the body burns fat** must include: • relationship between exercise intensity and fat utilisation • contribution of different energy systems. **6.8 Relationship between METs (metabolic equivalent) and kilocalories** must include: • the concept of metabolic equivalents • estimation of energy expenditure during physical activity.
7. Know the structure and function of the nervous system in relation to health and fitness
7.1 Functions and roles must include: • the role of the nervous system in controlling body functions • communication between the brain, spinal cord and body • co-ordination of movement. **7.2 Components of the nervous system** must include: • central nervous system • peripheral nervous system • somatic branch of the peripheral nervous system • autonomic branch of the peripheral nervous system • neurotransmitters and receptors. **7.3 Structure and function of a neuron** must include: • structural components of a neuron • the role of neurons in transmitting nerve impulses. **7.4 Structure and function of a motor unit** must include: • the relationship between motor neurons and muscle fibres

Range
• role of motor units in muscle contraction. **7.6 Stages** must include: • the role of sensory receptors • the neural pathway involved • the effect on muscle contraction and relaxation. **7.7 Structure and function of muscle spindles** must include: • their location within muscles • their role in detecting changes in muscle length. **7.8 Structure and function of Golgi tendon organs** must include: • their location within tendons • their role in detecting muscle tension. **7.9 Definition and function of autogenic inhibition** must include: • the role of Golgi tendon organs • the effect on muscle relaxation. **7.10 Definition and function of reciprocal inhibition** must include: • interaction between agonist and antagonist muscles • the role of the nervous system in co-ordinating movement. **7.11 Neuromuscular adaptations** must include: • neuromuscular adaptations to training • implications for strength, power and co-ordination. **7.12 Changes** must include: • changes in neural function • changes affecting co-ordination and reaction time • implications for physical activity and exercise.
8. Know the structure and function of the endocrine system in relation to health and fitness
8.1 Role of the endocrine system must include: • the role of hormones in regulating body functions • communication between endocrine glands and target tissues • regulation of physiological processes relevant to exercise. **8.2 Endocrine glands** must include: • hypothalamus • pineal

Range
• pituitary • thyroid • pancreas • adrenal • ovaries • testes. **8.3 Hormones** must include: • growth hormone • thyroid hormones • corticosteroids • catecholamines • insulin • glucagon. **8.4 Lifestyle factors** must include: • physical activity levels • nutrition • sleep • stress. **Endocrine health** must include: • hormone production and regulation. **8.5 Catabolic and anabolic effects** must include: • adaptation to training. **8.6 Relationship between exercise intensity and hormonal reactions** must include: • changes in hormonal responses at different exercise intensities • implications for training adaptations.
9. Know how the immune system relates to exercise
9.1 Potential long-term effects must include: • effects of regular physical activity on immune function • differences between moderate and excessive exercise • implications for illness and recovery. **9.2 Open window theory** must include: • the concept of the open window theory • the period following intense or prolonged exercise when immune function may be temporarily reduced • the potential implications for increased susceptibility to infection.

Range
10. Understand the components of fitness
10.1 Somatotypes must include: • endomorphic • ectomorphic • mesomorphic. **10.2 Anatomical and hormonal differences** must include: • anatomical differences relating to: ○ body composition   ○ muscle mass   ○ skeletal structure • hormonal differences relating to: ○ the influence of primary sex hormones   ○ implications for exercise performance and adaptation.

Unit 02 Principles of nutrition for exercise and health (R/651/4026)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**6 credits**	**45 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Understand how to access credible information about nutrition for exercise and health	1.1 Interpret evidence-based nutritional guidelines from **credible sources**
	1.2 Differentiate between **credible evidence-based information** and unscientific claims made in the media
2. Know the nutrients required to maintain health	2.1 Describe the **macronutrients** and their **functions**
	2.2 Identify **good dietary sources** of each macronutrient
	2.3 Identify the transport, storage and metabolised forms of each macronutrient
	2.4 Identify the **balance** between saturated and unsaturated fatty acid and its effects on health
	2.5 Describe the **importance of the appropriate intake of essential fatty acids** and their effects on health
	2.6 Identify the role and the desirable levels of **fat/lipid markers** in the body
	2.7 Identify the **glycaemic index rating system** for foods containing carbohydrates and its importance for human health
	2.8 Identify key **micronutrients** and their functions
	2.9 Identify good dietary sources of **key micronutrients**
	2.10 Identify the **importance of phytonutrients** to human health
	2.11 Describe the **functions** of water in the body
3. Know how nutrients from food are used to fuel and recover from physical activity	3.1 Evaluate the functions of macronutrients, micronutrients and water in relation to exercise performance and recovery
	3.2 Explain how training may **affect** an individual's nutritional requirements
	3.3 Describe the **nutrients used** for generating energy during rest and exercise
	3.4 **Analyse** the relative contribution of each nutrient to total energy expenditure in activities of **different intensities**
	3.5 Evaluate the role of each **macronutrient** in post-exercise recovery and relate this to post-exercise dietary guidelines
	3.6 Describe current **hydration and electrolyte consumption guidelines** for physical activity
4. Know how to estimate daily energy and nutrient requirements for clients with different goals	4.1 Define **terms related to weight management**
	4.2 Identify **methods** to estimate calorie requirements
	4.3 Identify safe and effective **guidelines** for the rate of fat loss achievable through diet modification and exercise
	4.4 Critically **compare guidelines** for the rate of muscle gain achievable through diet modification and exercise to analyse safety and effectiveness

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	4.5 Identify **energy needs** for different activities/sports/fitness plans
	4.6 Identify a range of legally available **ergogenic aids**
5. Know the risks of poor nutritional and lifestyle practices	5.1 Identify the **signs, symptoms and risks** of dehydration
	5.2 Analyse the **risks of diets that severely restrict energy intake**
	5.3 Analyse the **risks of diets that contain high intakes of processed food products and few real foods**
	5.4 Identify the **role of alcohol** as a non-nutrient dietary source of energy
	5.5 Identify the **effects of caffeine** on the body
6. Know the nutritional considerations for specific client groups	6.1 Explain the relevant nutritional guidelines for specified **medical conditions**
	6.2 Identify the **professional boundaries** for a personal trainer with regard to providing nutritional information and advice
	6.3 Identify **when to refer or signpost a client** to a professional qualified to deal with specific nutritional and dietary requirements
7. Be able to analyse clients' dietary habits and identify areas for improvement	7.1 Use **appropriate methods** to collect nutritional information from clients with **different goals**
	7.2 Use appropriate methods to analyse a **client's nutritional information**
	7.3 **Analyse a client's collected nutritional data** to identify areas of improvement in line with current nutritional guidelines
	7.4 **Analyse a client's collected data** to identify areas of improvement in line with their nutritional goals
	7.5 Identify any **potential barriers** to change that a client may face
	7.6 Identify **ways that a client can overcome their barriers**
	7.7 Identify **how training will affect a client's nutritional requirements**, including any recommendations related to a client's fitness goals
	7.8 Identify **reputable sources of information** for providing nutritional guidance

Range
1. Understand how to access credible information about nutrition for exercise and health
1.1 Credible sources must include: • national food guides • professional dietetic bodies • independent scientific bodies. **1.2 Credible evidence-based information** must include consideration of: • source credibility • peer-reviewed research • professional or scientific endorsement • consistency with the overall weight of evidence • common features of unscientific or misleading health claims.
2. Know the nutrients required to maintain health

Range

2.1 and 2.3 Macronutrients must include:

- carbohydrates
- protein
- fat.

Functions must include:

- energy provision
- structural or functional roles in the body.

2.2 Good dietary sources must include:

- nutritional quality
- level of processing/refinement
- contribution to a healthy balanced diet.

2.4 Balance must include:

- saturated fats
- unsaturated fats
- implications for cardiovascular health
- the importance of overall dietary balance.

2.5 Importance of the appropriate intake of essential fatty acids must include:

- omega-3 fatty acids
- omega-6 fatty acids
- appropriate dietary intake
- effects on health.

2.6 Fat/lipid markers must include:

- total cholesterol
- high density lipoproteins (HDL)
- low density lipoproteins (LDL)
- total cholesterol/HDL ratio.

2.7 Glycaemic index rating system must include:

- the glycaemic index rating system
- factors affecting blood glucose response
- limitations of using GI in isolation
- relevance to health and weight management.

2.8 Micronutrients must include:

- vitamins

Range
• minerals. Learners must cover a minimum of 7 vitamins and 4 minerals. **2.9 Key micronutrients** must include: • vitamins • minerals. Learners must cover a minimum of 6 vitamins and 5 minerals. **2.10 Importance of phytonutrients** must include: • the role of plant-based foods in health • the contribution of phytonutrients to a healthy diet • links to disease prevention or overall wellbeing. **2.11 Functions** must include: • hydration • transport • temperature regulation • physiological functioning.
3. Know how nutrients from food are used to fuel and recover from physical activity
3.2 Affect must include: • energy requirements • macronutrient requirements • hydration requirements • recovery needs. **3.3 Nutrients used** must include: • carbohydrate • fat • protein. **3.4 Analyse** must include: • carbohydrate contribution • fat contribution • protein contribution. **Different intensities** must include: • lower-intensity activity • moderate-intensity activity • higher-intensity activity.

Range
3.5 Macronutrient must include: • carbohydrate • protein • fat in relation to: • glycogen restoration • tissue repair • recovery guidance following exercise. **3.6 Hydration and electrolyte consumption guidelines** must include: • fluid intake • hydration before, during and after activity • electrolyte replacement • relevance of exercise duration and intensity.
4. Know how to estimate daily energy and nutrient requirements for clients with different goals
4.1 Terms related to weight management must include: • calorie • energy balance • negative energy balance • positive energy balance • basal metabolic rate (BMR) • thermic effect of food (TEF) • thermic effect of physical activity (TEPA) • non-exercise activity thermogenesis (NEAT). **4.2 Methods** must include: • methods based on body weight • methods based on activity levels • estimation of total daily energy requirements. **4.3 Guidelines** must include: • safe rate of fat loss • the role of calorie deficit • the role of physical activity and exercise • the need to preserve health and lean tissue. **4.4 Compare guidelines**; learners must consider: • realistic rates of muscle gain • energy intake • protein intake

Range
• resistance training • safety and effectiveness. **4.5 Energy needs** must include: • differing activity levels • endurance-focused activity • strength or hypertrophy-focused activity • weight-management goals. **4.6 Ergogenic aids** must include: • sports drinks • protein shakes • caffeine.
5. Know the risks of poor nutritional and lifestyle practices
5.1 Signs, symptoms and risks must include: • health • exercise performance. **5.2 Risks of diets that severely restrict energy intake** must include: • physical risks • psychological or behavioural risks • effects on health, performance and body composition. **5.3 Risks of diets that contain high intakes of processed food products and few real foods** must include: • excessive energy intake • poor nutrient density • impact on health • impact on body weight/body composition. **5.4 Role of alcohol** must include: • alcohol as a source of energy • lack of nutrient value • implications for health • implications for body composition and recovery. **5.5 Effects of caffeine** must include: • physiological effects • potential benefits • potential risks or adverse effects.
6. Know the nutritional considerations for specific client groups

Range

6.1 Medical conditions may include:

- hypertension
- obesity
- cardiovascular disease
- diabetes.

6.2 Professional boundaries must include:

- what is in scope:
  - food and general nutritional advice for generally healthy individuals
  - principle-based guidance to support behaviour change
- what is outside scope:
  - nutritional guidance for diagnosed health conditions
  - nutritional guidance for special population groups
  - prescriptive supplement dosages
  - rigid pre-set meal plans.

6.3 When to refer or signpost a client must include:

- needs beyond the personal trainer's scope of practice
- diagnosed medical conditions
- specialist nutritional support requirements.

7. Be able to analyse clients' dietary habits and identify areas for improvement

7.1 Appropriate methods may include:

- questionnaires
- food diary / recall methods
- interview or consultation
- observation
- digital food tracking tools.

Different goals may include:

- fat loss
- muscle gain
- preparing for an endurance event
- preparing for a strength and power event.

7.2 Client's nutritional information must include:

- eating/drinking behaviours that are detrimental to health
- positive eating behaviours a client should continue
- hydration levels
- alcohol consumption
- processed food levels
- fruit and vegetable intake
- macronutrient levels.

Range

7.3 Analyse a client's collected nutritional data must include:

- comparison against healthy eating guidelines
- identification of strengths
- identification of areas for improvement.

7.4 Analyse a client's collected data must include:

- alignment with the client's stated goals
- prioritisation of changes required
- realistic and individualised improvement areas.

7.5 Potential barriers may include:

- food preferences
- time for shopping and preparation
- family commitments
- social habits
- employment commitments
- support networks
- health-related issues.

7.6 Ways that a client can overcome their barriers may include:

- planning and preparation
- social and family support
- gradual behaviour change
- monitoring and review.

7.7 How training will affect a client's nutritional requirements must include:

- total energy intake
- macronutrient intake
- hydration
- recovery requirements
- goal-specific recommendations.

7.8 Reputable sources of information may include:

- national food guides
- recognised scientific or health organisations
- professional dietetic bodies
- evidence-based publications.

Unit 03 Understanding lifestyle, wellbeing and common medical conditions (T/651/4027)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**5 credits**	**35 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Understand the role of the personal trainer in health promotion	1.1 Identify the **concepts** of physical activity, exercise and sport
	1.2 Identify the **benefits** of physical activity and the significance of these benefits in reducing disease risks
	1.3 Describe the current **guidelines for health promotion, physical activity and wellness**
	1.4 Describe the current **guidelines for structured exercise and physical fitness**
	1.5 Identify the **exercise continuum** for different levels of physical activity, including the relative benefits of each level
	1.6 Identify the **agencies** involved in promoting physical activity for health in the UK
	1.7 Identify the **variables involved** in the promotion of a healthy lifestyle
2. Understand how to risk-stratify and when to refer clients with common medical conditions	2.1 Identify **risk stratification models** used to assess risk
	2.2 Identify **how different conditions and pathophysiology are risk stratified**, including contraindications for exercise
	2.3 Identify when clients need to be signposted to other professionals
	2.4 Identify the reasons a client should be signposted to a medical or healthcare professional
	2.5 Describe how **signposting** a client to other services can support lifestyle behaviour change
	2.6 Identify the **professional boundaries** for a personal trainer with regard to providing nutritional information and advice
	2.7 Identify when to refer or signpost a client to a professional qualified to deal with specific nutritional and dietary requirements
3. Understand how lifestyle factors affect a client's health and wellbeing	3.1 Explain the **components of health and wellbeing**
	3.2 Describe the **factors** that determine the success of a client when attempting to make a lifestyle behaviour change
4. Understand commonly occurring medical conditions and how they may impact a client's lifestyle	4.1 Identify the causes of **specified medical conditions**
	4.2 Identify the progression of specified medical conditions
	4.3 Identify the risk factors of specified medical conditions
	4.4 Describe the clinical signs and symptoms of specified medical conditions
	4.5 Describe the **risks and benefits of exercise for specific medical conditions**
	4.6 Describe how specified medical conditions may impact a **client's lifestyle**
	4.7 Describe **considerations** for exercise when dealing with comorbidities

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
5. Be able to access reputable information and apply to ageing clients with low-risk medical conditions	5.1 Identify and justify reputable and applicable sources of information used to inform the programme design for ageing clients with **low-risk medical conditions**
	5.2 Design and justify an appropriate **warm-up component** for an ageing client with low-risk medical conditions
	5.3 Design and justify an appropriate **main component** for an ageing client with low-risk medical conditions
	5.4 Design and justify an appropriate **cool-down component** for an ageing client with low-risk medical conditions
	5.5 Identify and justify appropriate **active daily living (ADL) advice** for an ageing client with low-risk medical conditions

Range

1. Understand the role of the personal trainer in health promotion

1.1 Concepts must include:

- physical activity undertaken in everyday life
- exercise as structured and purposeful physical activity
- sport as organised or competitive activity
- differences in purpose and characteristics between these concepts.

1.2 Benefits must include:

- cardiovascular fitness
- muscular strength
- muscular endurance
- flexibility-related.

1.3 Guidelines for health promotion, physical activity and wellness must include:

- recommended participation in regular physical activity
- moderate and vigorous physical activity
- muscle-strengthening activities
- reducing sedentary behaviour
- general wellbeing recommendations.

1.4 Guidelines for structured exercise and physical fitness must include:

- frequency of exercise participation
- exercise intensity considerations
- duration of exercise sessions
- types of exercise used to develop physical fitness
- inclusion of cardiovascular and resistance training.

Range
1.5 Exercise continuum must include: • difficulty based around the intensity, volume and duration of the planned activity. **1.6 Agencies** must include organisations involved in: • national health promotion • public health guidance • sport and physical activity participation initiatives. **1.7 Variables involved** must include: • nutrition • sleep • other opportunities for physical activity in everyday life • stress management • avoidance of smoking • excess sitting • excess alcohol and drugs.
2. Understand how to risk-stratify and when to refer clients with common medical conditions
2.1 Risk stratification models must include: • the risk stratification pyramid • Irwin and Morgan risk stratification tool • logic model • ACSM cardiovascular disease risk stratification model. **2.2 How different conditions and pathophysiology are risk stratified** must include: • categorisation of clients according to risk level • consideration of medical conditions and associated pathophysiology • identification of exercise contraindications • implications for exercise participation and programme design. **2.5 Signposting** must include: • access to specialist knowledge or services • support for behaviour change • improved health outcomes • multidisciplinary support where appropriate. **2.6 Professional boundaries** must include: • provision of general healthy eating advice for healthy individuals • supporting lifestyle behaviour change related to general nutrition • recognising limitations of scope of practice • referral or signposting to appropriately qualified professionals when required.
3. Understand how lifestyle factors affect a client's health and wellbeing

Range
3.1 Components of health and wellbeing must include: • biological • behavioural • psychological • social. **3.2 Factors** must include: • personal motivation • psychological influences • social support • environmental influences • access to opportunities or resources that support behaviour change.
4. Understand commonly occurring medical conditions and how they may impact a client's lifestyle
4.1 to 4.6 Specified medical conditions may include: • hypertension • obesity • cardiorespiratory disease • diabetes. **4.5 Risks and benefits of exercise for specific medical conditions** must include: • exercise guidelines, restrictions and contraindications • nutritional guidelines. **4.6 Client's lifestyle** must include: • dietary modifications • exercise contraindications • ability to partake in physical activity. **4.7 Considerations** must include: • the presence of multiple medical conditions • interactions between conditions affecting exercise participation • exercise modification and safety considerations • implications for programme design and monitoring.
5. Be able to access reputable information and apply to ageing clients with low-risk medical conditions
5.1 Low-risk medical conditions may include: • hypertension • obesity • cardiorespiratory disease • diabetes.

Range
5.2 Warm-up component may consider: • preparation of the cardiovascular and musculoskeletal systems • gradual increase in exercise intensity • considerations for age-related physiological changes. **5.3 Main component** may consider: • cardiovascular activities • muscular strength or endurance activities • exercise intensity appropriate to the client's condition • individual needs and limitations. **5.4 Cool-down component** may consider: • gradual reduction in exercise intensity • recovery and relaxation • mobility or flexibility activities, where appropriate. **5.5 Active daily living (ADL) advice** may consider: • increasing daily movement • reducing sedentary behaviour • incorporating functional physical activity into daily routines.

Unit 04 Encouraging positive health and fitness behaviours (Y/651/4028)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**5 credits**	**35 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Understand the importance of communication skills to effectively communicate and engage with clients	1.1 Identify the concept of **client touch points** within an organisation
	1.2 Identify the importance of **positive client experiences** at every touch point
	1.3 Describe the **importance of effective communication skills** for a personal trainer
	1.4 Identify how to **create a positive impression of self**
	1.5 Identify **how you can get to know different clients**
	1.6 Describe **ways to build rapport** with different clients
	1.7 Describe **methods of initiating conversation** with a client
	1.8 Identify how a personal trainer's **communication skills can influence the quality of information** offered by a client
	1.9 Identify how a personal trainer's **communication skills can influence a client's programme success**
	1.10 Identify how a personal trainer's **communication style** can influence a client's motivation and commitment to making lifestyle changes
	1.11 Explain how **non-verbal communication** influences consultation and programme outcomes
	1.12 Identify the types of **action that clients will see as adding value to their experience**
	1.13 Identify the **behaviours that will make a client feel special**
2. Understand techniques used to effectively communicate and engage with clients	2.1 Identify the **effective communication skills** that can enhance a relationship between the personal trainer and their client
	2.2 Identify the difference between open and closed questions
	2.3 Describe the process of **active listening**
	2.4 Describe how to use **affirming statements**
	2.5 Describe how to use **reflective statements** effectively
	2.6 Identify types of **non-verbal communication**
	2.7 Identify how to adapt communication for a range of **participant needs** and types
3. Understand techniques used to support clients making lifestyle behaviour changes	3.1 Describe the **stages of behavioural change**
	3.2 Identify **techniques** that can be used to determine a client's level of readiness to make a lifestyle change
	3.3 Identify **how techniques can be used** to determine a client's level of readiness to make a lifestyle change
	3.4 Describe different underlying **motives for exercise** and the concepts of internal and external motivation
	3.5 Identify how **processes** can be used to support clients when making lifestyle behaviour changes

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	3.6 Identify how **social support** will influence the success of a client when attempting to make a lifestyle behaviour change
	3.7 Explain how providing **client education** can support lifestyle behaviour change
	3.8 Identify how signposting a client to other services can support lifestyle behaviour change
	3.9 Identify **techniques and models** that can be used to help a client change their lifestyle behaviour
4. Understand how to create a positive environment that motivates and empowers clients to meet their desired goals	4.1 Explain how to **create a positive environment** that motivates and empowers clients to achieve their desired goals
	4.2 Identify **how the environment can have an effect on adherence** to a behaviour change programme
	4.3 Identify the **environmental factors** that can have a positive effect on adherence and achievement of goals
5. Know how to collect and interpret health screening and fitness assessment data	5.1 Identify a range of **health screening measurements** that can be conducted to inform programme design
	5.2 Describe **established protocols for health screening measurements**
	5.3 Interpret **outcomes of health screening measurements** and risk-stratify clients
	5.4 Identify a range of **fitness assessments** that can be performed to evaluate client ability
6. Be able to health screen clients	6.1 Use **suitable tools** (PARQ/risk stratification) to accurately determine if the client is within scope of practice
	6.2 Explain the **outcome of health screening** to the client and signpost the client to a medical or health-care professional if necessary
7. Be able to carry out and analyse a range of applicable fitness assessments	7.1 Implement a fair and accurate process of informed consent prior to assessments and adequately explain the requirements and demands of the planned assessments
	7.2 Apply the established protocols to safely, effectively and accurately carry out recognised health-based assessments
	7.3 Apply the established protocols to safely, effectively and accurately carry out recognised **fitness assessments**
	7.4 **Analyse** and explain health and fitness assessment findings to the client, allowing time for questions and providing full, accurate answers in a way that meets the needs of the client
	7.5 Record and store information and results appropriately with confidentiality and data requirements met
8. Be able to gather client information, set goals and action plan throughout the consultation	8.1 Interpret a client's level of readiness to change
	8.2 Identify **personal barriers** in achieving their goals
	8.3 Apply **techniques** to help the client identify possible ways to overcome barriers and maximise motivators
	8.4 Identify at least one specific lifestyle behaviour that they can change to achieve their health and fitness aspirations and explain how this/these change/s will support them
	8.5 Develop basic **SMART goals** that address **client requirements**

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	8.6 Signpost clients to **relevant products or services** that may increase their capability or opportunity to achieve their SMART goals
	8.7 Provide **credible information** to assist the client in understanding and achieving health and fitness goals
9. Be able to effectively communicate with client throughout the consultation	9.1 Politely introduce themself to the client and initiate conversation to create a positive impression
	9.2 Apply **effective communication techniques** to build a rapport and motivate the client, including active listening
	9.3 Apply **open questions** to encourage the client to respond with detailed answers
	9.4 Apply follow-up questions to encourage the client to elaborate on a response
	9.5 Apply **reflective statements** effectively
	9.6 Implement a process of informed consent at appropriate points in the consultation, encouraging the client to ask questions
	9.7 Demonstrate empathy when discussing lifestyle behaviours with the client
	9.8 Record the **key information** collected from verbal discussions accurately without detracting noticeably from the conversation
10. Be able to conclude the consultation	10.1 Explain the benefits of **reviewing progress** against SMART goals at regular intervals
	10.2 Schedule a programme review date with the client for an appropriate date in the future
	10.3 Explain the anticipated progress that can be expected for key measurements at the review
	10.4 Clarify that the client is satisfied with the action plan that has been agreed
	10.5 Agree a **communication strategy** to provide support between face-to-face personal training sessions
11. Be able to research, evaluate and recommend data-driven technology for clients	11.1 Research and evaluate current **data-driven technological developments** in health, fitness and exercise, to include the advantages and disadvantages to a client and a personal trainer
	11.2 Describe how to maintain legal, ethical and professional standards when working with the chosen technology
	11.3 Describe how to maintain **privacy of client data** when working with chosen technology
	11.4 Choose a data driven technological development in health, fitness and exercise to recommend to a client
	11.5 Explain how the technology will benefit the client and help them achieve their goals
	11.6 Explain **how the data from the technology will be used** to enhance a client's programme
12. Be able to implement, analyse and review the	12.1 Collate and provide **evidence of implementation** and data collection taking care not to infringe data laws/requirements

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
use of data driven technology for clients	12.2 Describe what **conclusions** to draw from the data
	12.3 Explain how this could inform a clients' **future performance or goals**
	12.4 **Evaluate** if the output from the technological aid helped in meeting a client's goals
	12.5 **Evaluate** whether you would use the same method and technological aid again

Range
1. Understand the importance of communication skills to effectively communicate and engage with clients
1.1 Client touch points may include: • face-to-face interaction • telephone communication • email communication • social media interaction • video conferencing • digital or traditional marketing communication • articles, newsletters or editorials • presentations or workshops • group activities or events. **1.2 Positive client experiences** may include: • consistent professional communication • responsiveness to client needs • supportive and encouraging interactions • professional presentation • reliable and trustworthy service • providing clear information. **1.3 Importance of effective communication skills** may include: • building rapport and trust • supporting client understanding • improving client engagement • encouraging adherence to exercise • supporting behaviour change. **1.4 Create a positive impression of self** may include: • professional appearance • confident body language • appropriate tone of voice • punctuality

Range

- professionalism.

1.5 How you can get to know clients may include:

- consultation discussions
- questioning techniques
- listening to client responses
- reviewing lifestyle behaviours
- discussing goals and motivations.

1.6 Ways to build rapport may include:

- demonstrating empathy
- active listening
- showing interest in the client
- positive body language
- supportive communication.

1.7 Methods of initiating conversation may include:

- open-ended questions
- informal introductory discussion
- discussion of goals or motivations
- discussion of previous exercise experience.

1.8 Communication skills can influence the quality of information may include:

- active listening
- open questioning
- reflective responses
- creating a non-judgemental environment.

1.9 Communication skills can influence a client's programme success may include:

- clear instructions
- supportive feedback
- goal clarification
- motivational encouragement.

1.10 Communication style may include:

- supportive language
- positive reinforcement
- constructive feedback
- collaborative communication.

1.11 Non-verbal communication may include:

Range
• facial expressions • body language • posture • gestures • tone of voice. **1.12 Action that clients will see as adding value to their experience** may include: • providing additional guidance or advice • following up between sessions • monitoring progress • offering encouragement • recognising client achievements. **1.13 Behaviours that will make a client feel special** may include: • remembering client preferences • demonstrating respect and empathy • recognising client achievements • showing genuine interest in client progress.
2. Understand techniques used to effectively communicate and engage with clients
2.1 Effective communication skills may include: • active listening • open questioning • reflective responses • affirmations • summarising. **2.3 Active listening** may include: • paying full attention to the client • observing verbal and non-verbal cues • reflecting or paraphrasing responses • clarifying understanding • summarising information. **2.4 Affirming statements** may include: • recognising client strengths • acknowledging effort • reinforcing positive behaviours • demonstrating empathy. **2.5 Reflective statements** may include: • paraphrasing client responses • repeating key information

Range
• reflecting feelings or concerns. **2.6 Non-verbal communication** may include: • facial expression • posture • gestures • body orientation • tone of voice. **2.7 Participant needs** may include: • age • cultural background • communication preferences • confidence levels • experience with exercise.
3. Understand techniques used to support clients making lifestyle behaviour changes
3.1 Stages of behavioural change must include: • pre-contemplation • contemplation • preparation • action • maintenance • relapse. **3.2 Techniques** may include: • open questioning • discussion of motivations • discussion of barriers • readiness or confidence scaling • consultation discussion. **3.3 How techniques can be used** may include: • exploring motivations for change • identifying perceived barriers • identifying perceived benefits • assessing confidence and self-efficacy. **3.4 Motives for exercise** must include: • intrinsic motivation • extrinsic motivation and may include:

Range
• health improvement • physique or appearance goals • performance or sporting goals • social interaction • enjoyment. **3.5 Processes** must include: • goal setting • monitoring • reviewing • evaluating. **3.6 Social support** may include: • encouragement from friends or family • peer support • group exercise environments • trainer encouragement and feedback. **3.7 Client education** may include: • explaining health benefits of exercise • explaining risks of sedentary behaviour • providing information about healthy lifestyle behaviours • supporting informed decision making. **3.9 Techniques and models** must include: • transtheoretical model of behaviour change • COM-B model • health belief model • self-determination theory • motivational interviewing.
4. Understand how to create a positive environment that motivates and empowers clients to meet their desired goals
4.1 Create a positive environment may include: • supportive and encouraging communication • inclusive and welcoming environment • safe and comfortable training environment • positive trainer attitude. **4.2 How the environment can have an effect on adherence** may include: • accessibility of facilities • social environment

Range
• convenience of location or schedule • perceived safety of the environment • enjoyment of the environment. **4.3 Environmental factors** affecting adherence may include: • facility or training environment • equipment availability • social support • accessibility of location • comfort and safety of environment.
5. Know how to collect and interpret health screening and fitness assessment data
5.1 Health screening measurements may include measurements used to assess: • cardiovascular health indicators • body composition indicators • anthropometric measurements • health risk factors. **5.2 Established protocols for health screening measurements** may include: • following standardised testing procedures • ensuring appropriate preparation of the client • ensuring client safety and comfort • maintaining accurate records of results • obtaining informed consent prior to testing. **5.3 Outcomes of health screening measurements** may include: • identifying any health risk factors • identifying any contraindications to exercise • informing exercise programme design • determining whether referral or signposting is required. **5.4 Fitness assessments** must include: • cardiovascular assessments • muscular strength and endurance assessments • posture and flexibility assessments • motor skill assessments.
6. Be able to health screen clients
6.1 Suitable tools must include tools used for: • pre-exercise screening • risk stratification. **6.2 Outcome of health screening** may include:

Range
• explaining screening results to the client • identifying potential health risks • advising on safe participation in exercise • signposting or referral where appropriate.
7. Be able to carry out and analyse a range of applicable fitness assessments
7.3 Fitness assessments must include: • cardiovascular fitness assessments • muscular strength or endurance assessments • posture or flexibility assessments • motor skill assessments. **7.4 Analyse** may include: • comparison with normative data • identifying strengths and weaknesses • identifying areas for improvement • informing programme design.
8. Be able to gather client information, set goals and action plan throughout the consultation
8.2 Personal barriers may include: • lack of time • lack of motivation • lifestyle commitments • environmental barriers • psychological barriers. **8.3 Techniques** may include: • discussion of motivators • exploration of support systems • identifying solutions to barriers • identifying strategies to increase adherence. **8.5 SMART goals** must be: • specific • measurable • achievable • realistic • time-bound. **Client requirements** may include: • needs • current abilities • wants • motivators.

Range
8.6 Relevant products or services may include: • health and fitness services • exercise programmes • specialist support services • additional professional support. **8.7 Credible information** may include information sources such as: • research articles • books • websites • leaflets • magazine articles.
9. Be able to effectively communicate with client throughout the consultation
9.2 Effective communication techniques must include active listening. Techniques may include: • questioning techniques • reflective statements • affirmations • summarising. **9.3 Open questions** must encourage discussion and detailed responses. **9.5 Reflective statements** may include: • repeating key information • paraphrasing client responses • reflecting thoughts or feelings. **9.8 Key information** may include: • written consultation records • digital consultation records • secure storage of information.
10. Be able to conclude the consultation
10.1 Reviewing progress may include: • monitoring progress against SMART goals • reviewing behaviour change strategies • reviewing progress measurements. **10.5 Communication strategy** may include: • face-to-face communication • telephone communication

Range
• email communication • digital communication.
11. Be able to research, evaluate and recommend data-driven technology for clients
11.1 Data-driven technological developments may include: • pedometers • heart rate monitors • mobile phone applications • wearable technologies. **11.3 Privacy of client data** must include: • secure storage of data • protection of confidentiality. **11.6 How the data from the technology will be used** may include: • monitoring progress • adapting programmes • reviewing goals.
12. Be able to implement, analyse and review the use of data driven technology for clients
12.1 Evidence of implementation may include: • screenshots • data downloads • written statements • photos. **12.2 Conclusions** may include: • trends in behaviour or performance • progress towards goals. **12.3 Future performance or goals** may include: • adapting goals • modifying exercise programmes. **12.4 Evaluation** may include: • measurable progress towards the client's goals • trends or patterns identified from collected data • whether the data supported programme decisions or adaptations • the client's engagement with the technology • the relevance and usefulness of the collected data. **12.5 Evaluation** may include:

Range
• client preference and experience using the technology • the client's level of digital literacy • whether the technology supported motivation and adherence • whether the technology created barriers to participation • whether alternative technologies may be more suitable.

Unit 05 Programme design and delivery for personal training (A/651/4029)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**9 credits**	**60 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Understand the principles of safe and effective personal training programme design	1.1 Describe the **current evidence-based frequency, intensity, time and type (FITT) guidelines** for safe exercise programme design for healthy adults
	1.2 Identify the **methods of monitoring exercise intensity**, including the benefits and limitations of each method
	1.3 Describe the **principles of training**
	1.4 Describe **guidelines for programme design** to minimise injury risk and optimise recovery between training sessions and enable physiological adaptation to occur
	1.5 Identify a range of **training methods/techniques** that can be used to meet the needs of clients with a range of goals and ability levels
	1.6 Identify **how an exercise technique can be regressed, progressed or modified** using a range of variables to ensure that it meets a client's needs and goals
	1.7 Identify how to **select exercises, training protocols, equipment and environments** that meet a client's goals, ability level and preferences
	1.8 Identify **ways to observe and refine** a client's technique and postural alignment to maximise movement efficiency and performance
2. Understanding adaptations that occur as a consequence of training	2.1 Explain the importance of providing a proper **dose response relationship** according to the level of the individual
	2.2 Describe the **advantages and disadvantages of exercising at various intensities** for **clients of different abilities**
	2.3 Identify the **signs and symptoms of excessive effort** that would indicate the need for a change of intensity
	2.4 Identify the **continuum between muscular strength, and muscular endurance and neuromuscular efficiency**
	2.5 Identify **how muscular strength is influenced** by the use of high resistance and low repetitions so that motor unit recruitment is maximised and contractile limits are reached
	2.6 Identify **how muscular endurance is enhanced** by lower resistance loads and higher repetitions resulting in the build-up of lactic acid and inducing inhibition of further muscle contraction
	2.7 Identify how **increased endurance capacity** in muscles is developed between exercise sessions, leading to increased oxidative ability within muscles
	2.8 Identify the **repetition ranges** for **different types of resistance training**

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	2.9 Identify the range of **heart rate training zone models** for developing aerobic and anaerobic capacity
	2.10 Describe the **effects of health-related physical activities**
	2.11 Identify the various **methods of range of motion (flexibility) training** and the advantages and disadvantages of each to facilitate increased range of motion
	2.12 Identify the **role of the muscle spindle cells and the Golgi tendon organs** in these mechanisms
	2.13 Identify the recognised guidelines for developing the different components of fitness, emphasising the distinction between activity for health and exercise for health and fitness, from evidence-based information
3. Understand the principles of periodisation and how they can be used effectively to meet client goals and needs	3.1 Identify the principles and reasons for **periodised programme design**
	3.2 Identify a **range of periodised programme designs**
	3.3 Explain **how to apply the principles of periodisation** to programmes for a **range of goals and client needs**
4. Know how to safely and effectively integrate the use of alternative environments and online provision into personal training sessions	4.1 Identify the types of **alternative environments** that can be used for fitness training
	4.2 Describe the **benefits and disadvantages of alternative environments/methods**
	4.3 Identify the **legal and regulatory requirements** for health and safety specific to outdoor fitness training
	4.4 Identify possible **hazards and risks in outdoor fitness training environments**
	4.5 Describe how to **manage identified risks** in outdoor fitness training environments
	4.6 Identify a range of **exercise approaches suitable for outdoor fitness training**
5. Know the considerations for planning and delivering group personal training sessions	5.1 Identify a range of **group personal training methods/session types**
	5.2 Describe the **benefits and challenges** of delivering group personal training sessions
	5.3 Identify how to **incorporate the use of a partner or group** in personal training sessions
	5.4 Identify how to apply **safe session structure** to group sessions
	5.5 Identify **health and safety based operational procedures** that are key in planning and preparing group exercise sessions in an outdoor environment
	5.6 Identify **hazards and risk measures** to minimise risk during outdoor group-based personal training sessions
6. Be able to deliver a range of training techniques	6.1 Plan the techniques and assess the client's readiness to participate in the planned technique prior to this session
	6.2 Apply appropriate **workloads**, recovery workloads and **work-to-recovery timings** for the client's goals, needs and abilities

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	6.3 Explain the technique protocol and key teaching points to the client correctly and in an appropriate manner
	6.4 Apply the technique protocol accurately using suitable exercises and equipment
	6.5 Respond appropriately to the client's feedback and own observations
	6.6 Observe movement accurately and identify valid strategies to improve the client's exercise technique and movement quality using appropriate cues
	6.7 Monitor intensity accurately using suitable method(s) and modify exercise variables to achieve target workloads
	6.8 Apply practical skills where necessary to maintain safe and effective client exercise technique
	6.9 Apply **safe spotting and support**, where necessary, during the technique
	6.10 Select an appropriate muscle group and stretch position for applying the technique
	6.11 Observe the client and adapt their technique to ensure good body alignment and stretching of the target muscle group(s)
	6.12 Request feedback from the client to ensure the stretch was sensed in the target area and was not causing discomfort or pain
	6.13 **Provide feedback** to the client on their performance and recorded session data in an appropriate format
7. Be able to interpret and analyse information to plan progressive/periodised programmes	7.1 Analyse previously collected health and fitness data and information
	7.2 Implement calculations and risk-stratify the client correctly
	7.3 Complete the client profile and summarise the previously collected client information in a way that helps inform programme design
8. Be able to plan progressive/periodised programmes	8.1 Explain the **periodised strategy**
	8.2 Explain how **programme variables** were selected to meet the **client needs and goals**
	8.3 Identify the client's macrocycle/long-term goal/s
	8.4 Identify and split the macrocycle/long-term goals into mesocycles/phases of training using a periodised structure appropriate to the client's goals
	8.5 Identify where the 12-week case study fits in relation to the mesocycles/phases of training, ensuring it crosses at least 2 phases/mesocycles
	8.6 Apply **details** for each weekly microcycle that demonstrates progression within the mesocycles and over the course of the 12-week planned programme
	8.7 Apply the **principles** of periodised programme design
	8.8 Plan appropriate exercise sessions for phases of the progressive/periodised programme
	8.9 Design each session plan with adequate and appropriate warm-up and cool-down activities for minimising injury risk and aiding recovery

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
9. Be able to assess risk and apply adaptations and contingencies to progressive programmes	9.1 Plan an appropriate exercise session for the chosen **alternative environment/method** that maintains the goals and aims of the session
	9.2 Design appropriate warm-up and cool-down activities in chosen alternative environment/method for minimising injury risk and aiding recovery
	9.3 Identify possible hazards and risks for **programme variables**
	9.4 Identify ways to **manage the identified risks and apply appropriate adaptations and contingencies**
10. Be able to prepare the client, the environment and self for personal training sessions	10.1 Assess the client's readiness to participate in the planned session
	10.2 Explain the appropriate health and safety considerations to the client
	10.3 Explain the physical and technical demands of the planned exercises and components
	10.4 Gain client **consent/agreement** for the planned session
11. Be able to deliver personal training sessions	11.1 Observe the client's movement accurately and provide effective guidance to improve exercise technique and postural alignment
	11.2 Apply appropriate cues to correct the client's exercise technique and improve movement quality
	11.3 Coach the client to perform exercises with correct technique and postural alignment
	11.4 Positively reinforce correct exercise technique to build client self-efficacy
	11.5 Coach safe and effective lifting, passing and spotting techniques that are appropriate
	11.6 Adapt exercise complexity and intensity in response to monitoring observations to ensure safety and effectiveness
	11.7 Provide modifications for exercise techniques to enable the client to perform all movements safely and effectively
	11.8 Monitor the client's performance, responses and feedback to exercise relative to the intensity
	11.9 Adapt the planned session content in response to the client's progress and feedback, and record changes accurately
	11.10 Keep accurate records of exercise performance during the session to enable progress to be tracked over time
	11.11 Use appropriate strategies and techniques during the session to enhance the client's motivation and commitment
	11.12 Monitor the exercise environment to ensure the client's safety and comfort
12. Be able to review a personal training session	12.1 Provide motivational feedback on the client's performance and progress towards goals at the end of the session
	12.2 Request feedback from the client about their satisfaction with the session, programme and overall personal training service
	12.3 Request feedback from the client about specific ways in which the delivery of the personal training session could be improved
13. Be able to reassess and monitor client	13.1 Review client feedback covering progress, successes and challenges

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
progress, then adapt a progressive programme accordingly	13.2 Provide information on the client's progress, successes and challenges from a personal trainer's perspective
	13.3 Reassess assessment/measurement and record result
	13.4 Analyse results of assessment/measurement reassessment
	13.5 Review the client's goals documenting changes and reasoning
	13.6 Provide information on changes or adaptations required for the progressive programme
	13.7 Provide information on changes or adaptations to lifestyle and nutritional guidance
14. Be able to self-evaluate personal training performance throughout a progressive programme	14.1 Describe ways in which coaching and communication skills met the client's needs
	14.2 Describe ways in which coaching and communication skills could be improved to meet the client's needs
	14.3 Identify areas that could have been done differently to improve the client experience
	14.4 Identify actions to improve personal practice as a result of completing this case study

Range

1. Understand the principles of safe and effective personal training programme design

1.1 Current evidence-based frequency, intensity, time and type (FITT) guidelines may include:

- recommended aerobic activity levels for adults
- moderate and vigorous intensity activity classifications
- recommendations for muscular strength and endurance
- recommendations for flexibility training
- guidance relating to frequency and duration of activity
- recommendations to reduce sedentary behaviour
- considerations for different populations (for example, beginners, older adults).

1.2 Methods of monitoring exercise intensity must include**:**

- the Talk Test
- rate of perceived exertion (6 to 20 or 0 to 10)
- heart rate monitoring (age-related and heart rate reserve)
- observation.

1.3 Principles of training must include:

- specificity
- progressive overload
- reversibility
- adaptability
- recovery and rest
- individuality.

Range
1.4 Guidelines for programme design may include: • balancing overload and recovery • appropriate rest between sessions • progression of training variables • monitoring fatigue and overtraining • adapting programmes based on client response • inclusion of warm-up and cool-down. **1.5 Training methods/techniques** may include: • resistance training methods • cardiovascular training methods • flexibility training methods • functional training methods. **1.6 How an exercise technique can be regressed, progressed or modified** may include manipulation of: • intensity • volume • range of motion • stability • complexity of movement • speed of movement • equipment used. **1.7 Select exercises, training protocols, equipment and environments** may include consideration of: • client goals • client ability level • client preferences • safety and risk factors • availability of equipment • environment suitability. **1.8 Ways to observe and refine** may include: • observation of movement patterns • observation of posture and alignment • use of verbal cues • use of visual demonstration • use of feedback.
2. Understanding adaptations that occur as a consequence of training
2.1 Dose-response relationship may include: • relationship between training stimulus and adaptation

Range

- influence of intensity, volume and frequency
- differences between trained and untrained individuals.

2.2 Advantages and disadvantages of exercising at various intensities may include:

- low-intensity training
- moderate-intensity training
- high-intensity training

and may include consideration of:

- safety
- effectiveness
- fatigue
- suitability for different client types.

Clients of different abilities may include:

- sedentary (untrained)
- experienced (trained)
- high performers (well trained).

2.3 Signs and symptoms of excessive effort may include:

- fatigue
- loss of co-ordination
- dizziness or nausea
- excessive breathlessness
- inability to maintain technique.

2.4 Continuum between muscular strength, and muscular endurance and neuromuscular efficiency must include:

- relationship between load and repetitions
- progression from high load/low reps to low load/high reps.

2.5 How muscular strength is influenced must include:

- high resistance loads
- low repetitions
- motor unit recruitment.

2.6 How muscular endurance is enhanced must include:

- lower resistance loads
- higher repetitions
- fatigue-related limitations to contraction.

Range

2.7 Increased endurance capacity variables must include:

- increased numbers of mitochondria
- oxidative enzymes
- capillaries leading to increased oxidative ability within muscles.

2.8 Repetition ranges may include:

- low repetition ranges
- moderate repetition ranges
- high repetition ranges.

Different types of resistance training must include:

- strength
- power
- endurance
- muscle hypertrophy.

2.9 Heart rate training zone models may include:

- different heart rate zone models
- zones for aerobic development
- zones for anaerobic development.

2.10 Effects of health-related physical activities may include:

- cardiovascular health improvements
- metabolic health improvements
- musculoskeletal benefits
- mental health benefits.

Health-related physical activities must include:

- resistance training
- cardiovascular training
- range of motion training.

2.11 Methods of range of motion (flexibility) training may include:

- static stretching
- dynamic stretching
- advanced methods.

2.12 Role of the muscle spindle cells and the Golgi tendon organs must include:

- role of muscle spindles in detecting muscle length
- role of Golgi tendon organs in detecting tension.

Range
3. Understand the principles of periodisation and how they can be used effectively to meet client goals and needs
3.1 Periodised programme design may include: • structured variation of training variables over time • planned progression towards specific goals • balancing overload and recovery • prevention of plateaus • optimisation of performance and adaptation • reducing risk of overtraining. **3.2 Range of periodised programme designs** must include: • linear periodisation • non-linear (undulating) periodisation. **3.3 How to apply the principles of periodisation** may include: • manipulation of intensity and volume • progression across training phases • alignment with client goals • adapting to client ability and response • structuring programmes over time. **Range of goals and client needs** may include: • health-related clients • general fitness clients • fitness or sporting clients working towards an event • hypertrophy or strength-related clients.
4. Know how to safely and effectively integrate the use of alternative environments and online provision into personal training sessions
4.1 Alternative environments may include: • outdoor environment (face-to-face) • outdoor environment (online) • indoor environment (face-to-face) • indoor environment (online). **4.2 Benefits and disadvantages of alternative environments/methods** may include: • accessibility and convenience • variety and motivation • limitations in equipment availability • environmental factors (for example, weather) • safety considerations.

Range
4.3 Legal and regulatory requirements may include: • requirements relating to health and safety • responsibilities when working in non-gym environments • considerations for public liability and duty of care. **4.4 Hazards and risks in outdoor fitness training environments** may include: • environmental conditions • equipment-related risks • participant-related risks • location-specific hazards. **4.5 Manage identified risks** may include: • risk assessment procedures • adapting activities to reduce risk • ensuring safe use of equipment • supervision and control measures. **4.6 Exercise approaches suitable for outdoor fitness training** may include: • approaches using minimal equipment • bodyweight-based exercise approaches • cardiovascular-focused approaches • functional training approaches.
5. Know the considerations for planning and delivering group personal training sessions
5.1 Group personal training methods/session types may include: • circuit-based sessions • interval-based sessions • strength-focused sessions • functional or mixed-method sessions. **5.2 Benefits and challenges** may include: • increased motivation through group dynamics • social interaction • ability to train multiple clients • challenges with individualisation • safety and supervision considerations. **5.3 Incorporate the use of a partner or group** may include: • paired exercises • group circuits • shared equipment tasks • team-based activities.

Range
5.4 Safe session structure must include: • warm-up • main session • cool-down and may include: • appropriate sequencing of activities • gradual progression of intensity • recovery considerations. **5.5 Health and safety based operational procedures** may include: • risk assessment procedures • equipment checks • participant screening • emergency procedures • supervision ratios. **5.6 Hazards and risk measures** may include: • environmental hazards • participant safety considerations • equipment-related risks • control measures to reduce risk.
6. Be able to deliver a range of training techniques
6.2 Workloads and **work-to-recovery timings** may include: • selection of appropriate intensity • selection of work and recovery durations • consideration of client ability and goals • consideration of training method being used. **6.9 Safe spotting and support** must include: • safe positioning of the personal trainer and client • appropriate level of assistance • maintaining client safety throughout. **6.13 Provide feedback** may include: • performance feedback • session data feedback • appropriate communication format.
8. Be able to plan progressive/periodised programmes
8.1 Periodised strategy may include:

Range

- how the strategy will progress the client towards goal achievement
- how principles of periodisation have been applied.

8.2 Programme variables may include:

- volume
- intensity
- complexity
- range of motion
- lever length
- rate/speed
- rest
- plane of motion
- exercises
- training protocols
- equipment
- environments.

Client's needs and goals may include:

- health-related
- general fitness
- fitness- or sporting-related, working towards an event
- hypertrophy or strength-related.

8.6 Details must include:

- frequency
- intensity
- time
- type.

8.7 Principles must include:

- structured variation of training variables over time
- planned progression towards specific goals
- balancing overload and recovery
- prevention of plateaus
- optimisation of performance and adaptation
- reducing risk of overtraining.

9. Be able to assess risk and apply adaptations and contingencies to progressive programmes

Range
9.1 Alternative environment/methods may include: • outdoor environment (face-to-face) • outdoor environment (online) • indoor environment (face-to-face) • indoor environment (online). **9.3 Programme variables** must include: • facility/environment • equipment • activities • participants • emergency procedures. **9.4 Manage the identified risks and apply appropriate adaptations and contingencies** may include: • risk assessment and control measures • adapting exercises to reduce risk • modifying intensity, volume or complexity • alternative exercises or session structures • contingency planning in response to environmental or client factors.
10. Be able to prepare the client, the environment and self for personal training sessions
10.4 Consent/agreement must be an informed agreement from the client.

Unit 06 Professionalism and business acumen for personal trainers (H/651/4030)

Assessment				
Internally assessed and externally quality assured portfolio of evidence.				
Mandatory	**Achieved/not yet achieved**	**Level 3**	**6 credits**	**35 GLH**

Learning outcomes (LOs) The learner will:	**Assessment criteria (AC)** The learner can:
1. Understand the legal and professional requirements for personal training	1.1 Identify the ethical requirements that are intrinsic to the personal trainer role as stated in the code of practice that applies to and is recognised in the UK
	1.2 Describe the **legal guidelines, scope of practice and professional responsibilities** of a personal trainer
	1.3 Identify the importance of **professionalism** for a personal trainer
	1.4 Identify the **standards** expected of a personal trainer
	1.5 Identify the **consequences** of employers, employees and self-employed persons not following the legal and professional requirements
	1.6 Identify the implementation of the **processes in active leisure**
	1.7 Describe the employee and independent **contractor models**
2. Understand the requirements for a self-employed individual	2.1 Explain the **requirements for the self-employed** in the UK
	2.2 Identify the **insurance requirements** for being a self-employed individual
	2.3 Identify the **demands** of running a successful personal training business
3. Understand the legal and professional requirements for the management of personal information and records	3.1 Explain the **legal requirements** for the collection, usage, storage and disposal of personal information and records
	3.2 Identify the importance of accurate and confidential record keeping
	3.3 Identify the importance of maintaining standards when collecting, recording and using data from and on information technology (IT) applications
	3.4 Describe the **consequences** of employers, employees and self-employed persons not following the legal and professional requirements
4. Understand marketing techniques and tactics	4.1 Define the term 'marketing'
	4.2 Identify the **role of marketing a personal training business**
	4.3 Identify the factors that influence marketing decisions
	4.4 Identify the **components of a marketing mix**
	4.5 Identify the advantages and disadvantages of **common marketing methods or techniques** for a personal training business
	4.6 Explain the **purpose of a marketing plan/strategy** for a personal training business
	4.7 Identify **different methods of market research**
	4.8 Explain **how to conduct market research** for a personal training business
	4.9 Identify **methods of analysing results/data** from market research activities

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	4.10 Explain the **importance of setting goals for marketing performance**
	4.11 Identify the **importance of personal characteristics and interpersonal skills** when marketing self and the personal training business
	4.12 Identify ways to positively promote self and the personal training business using a range of resources
	4.13 Identify the **potential damage of a negative digital profile**
5. Understand how to close a sale	5.1 Identify the importance of building rapport and gaining commitment from prospective clients prior to closing a sale
	5.2 Explain the **importance of taking action to close a sale**
	5.3 Identify **ways to gain commitment and close sales**
6. Understand how to set budgets and manage finances in a personal training business	6.1 Describe the **purpose of an annual budget**
	6.2 Describe the **purpose of income and expenditure budgeting**
	6.3 Identify examples of typical business costs included in a budget
	6.4 Identify the difference between direct and indirect costs
	6.5 Identify the purpose of a balance sheet and profit and loss account
	6.6 Identify the purpose of key performance indicators (KPIs)
	6.7 Describe how additional services or products will **benefit clients**
	6.8 Describe how clients' use of additional services or products will **benefit a personal training business**
7. Understand how to monitor and interpret business data from a range of current IT applications	7.1 Describe the **process of gathering business data** using a range of current IT applications
	7.2 Identify methods of monitoring business data from a range of current IT applications
	7.3 Describe **how to interpret gathered business data** from a range of current IT applications
8. Understand how IT applications are used to support effective business planning and delivery	8.1 Identify current IT applications that are used to support effective business planning and delivery
	8.2 Identify ways IT applications can be used to support effective business planning and delivery
	8.3 Describe the **risks and benefits** of using IT applications to support effective business planning and delivery
	8.4 **Evaluate technologies** that support effective business planning and delivery
	8.5 Identify the **importance of a website** in personal trainer marketing
	8.6 Identify **how to leverage** blogs/vlogs and social media technology in personal trainer marketing
9. Be able to plan and strategise to develop a successful personal training business	9.1 Evaluate own **strengths, weaknesses, opportunities and threats** in relation to starting and running a personal training business
	9.2 Identify personal development/continued professional development to address own strengths, weaknesses, opportunities and threats
	9.3 Produce **business aims and objectives**
	9.4 Identify unique selling points (USPs)
	9.5 Set **key performance indicators (KPIs)/milestones**
	9.6 Identify possible areas of risk and/or difficulty during the planning, preparation or launch stage of the business

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
	9.7 Identify contingency plans to help manage risk and/or difficulty during the planning, preparation or launch stage of the business
	9.8 Describe **how to collect, use, store and dispose of information**, ensuring legal requirements are met
10. Be able to plan and strategise market research to run campaigns and develop additional products or services	10.1 Provide an overview of the **key objectives** for a marketing campaign
	10.2 Identify the target market for the marketing campaign
	10.3 Describe **ways to gain and retain clients** in a new Personal Training business
	10.4 Describe **how a digital profile will be used** to positively promote the business
	10.5 Identify the IT applications to be used to support business planning and delivery, how they will be used, their benefits and risks
	10.6 List accurate direct business costs included in a budget and relate to the planning, preparation and launch of business
	10.7 List accurate indirect business costs included in a budget and relate to the planning, preparation and launch of business
	10.8 Plan **regular review points** to monitor and evaluate the personal training business in line with key performance indicators (KPIs)/milestones
	10.9 Identify a research question to develop some additional products or services including online products and services
	10.10 Evaluate **methods of data collection** to develop some additional products or services
	10.11 Select **appropriate methods** of data collection to develop some additional products or services
	10.12 Explain **how to collect and test the data** to develop some additional products or services

Range
1. Understand the legal and professional requirements for personal training
1.2 Legal guidelines, scope of practice and professional responsibilities must include: • legal responsibilities relating to health, safety and welfare • scope of practice boundaries • duty of care to clients • equality and inclusion requirements. **1.3 Professionalism** must include: • impact on reputation and industry standards • client trust and retention • business success and credibility. **1.4 Standards** must include: • ethical conduct and integrity

Range
• client-centred practice • maintaining professional boundaries • safe working practices. **1.5 Consequences** must include: • legal consequences (for example, action, penalties) • reputational damage • loss of business/employment • disciplinary action. **1.6 Processes in active leisure** may include**:** • labour law • legal provisions on the protection of personal data • tax law • copyright law. **1.7 Contractor models** must include: • employed model characteristics • self-employed/contractor characteristics • advantages and limitations of each.
2. Understand the requirements for a self-employed individual
2.1 Requirements for the self-employed must include: • registration • keeping business records • completing applicable tax requirements/records • paying applicable tax • business expenses. **2.2 Insurance requirements** must include: • public liability insurance • professional indemnity insurance • personal accident/sickness cover. **2.3 Demands** must include: • time management demands • client retention and service delivery • financial management • marketing and business development.
3. Understand the legal and professional requirements for the management of personal information and records
3.1 Legal requirements must include:

Range
• data protection principles (for example, lawful use, storage, disposal) • client consent requirements • confidentiality and security of data. **3.4 Consequences** must include: • legal penalties • reputational damage • loss of client trust.
4. Understand marketing techniques and tactics
4.2 Role of marketing a personal training business must include: • attracting clients • maximising profitability • increasing revenue • building brand/profile. **4.4 Components of a marketing mix** must include: • product • price • place • promotion and may include: • people • processes • physical evidence. **4.5 Common marketing methods or techniques** must include: • digital marketing methods • traditional marketing methods • cost versus reach considerations. **4.6 Purpose of a marketing plan/strategy** must include: • structured planning • achieving business goals • guiding marketing decisions. **4.7 Different methods of market research** may include: • qualitative methods • quantitative methods • strengths and limitations.

Range
4.8 How to conduct market research must include: • defining research purpose • selecting methods • collecting data • identifying population sample • analyse data • present data • act on findings. **4.9 Methods of analysing results/data** may include: • qualitative analysis • quantitative analysis • use of charts or feedback. **4.10 Importance of setting goals for marketing performance** must include: • measuring success • guiding performance • improving decision making. **4.11 Importance of personal characteristics and interpersonal skills** must include: • communication skills • professionalism • interpersonal skills. **4.13 Potential damage of a negative digital profile** must include: • reputational damage • loss of clients • impact on business credibility.
5. Understand how to close a sale
5.2 The importance of taking action to close a sale must include: • converting interest into sales • business sustainability. **5.3 Ways to gain commitment and close sales** may include: • sales techniques • communication approaches • handling objections.
6. Understand how to set budgets and manage finances in a personal training business
6.1 Purpose of an annual budget must include: • financial planning

Range
• tracking income and expenditure. **6.2 Purpose of income and expenditure budgeting** must include: • monitoring financial performance • budgeting for sustainability. **6.7 Benefit clients** may include: • added value to clients • additional choice • enhanced experience. **6.8 Benefit a personal training business** may include: • increased revenue streams • improved client retention.
7. Understand how to monitor and interpret business data from a range of current IT applications
7.1 Process of gathering business data may include: • collection of client and business data using digital tools • use of software or applications to record data • organisation and storage of collected data. **7.3 How to interpret gathered business data** must include: • analysing trends or patterns in data • using data to inform business decisions • evaluating performance against targets.
8. Understand how IT applications are used to support effective business planning and delivery
8.3 Risks and benefits must include: • benefits (for example, efficiency, accessibility, communication, data management) • risks (for example, data breaches, cyber security threats, system failures). **8.4 Evaluate technologies** may include: • comparison of different technologies • suitability for business needs • effectiveness in improving efficiency or performance. **8.5 Importance of a website** must include: • online presence and visibility • promoting services and brand • attracting and engaging clients. **8.6 How to leverage** may include:

Range
• engaging with target audience • promoting services and expertise • building brand awareness.
9. Be able to plan and strategise to develop a successful personal training business
9.1 Strengths, weaknesses, opportunities and threats may include: • internal factors (strengths and weaknesses) • external factors (opportunities and threats). **9.3 Business aims and objectives** may include: • short-term aims • long-term aims • realistic and measurable objectives. **9.5 Key performance indicators (KPIs)/milestones** may include: • measurable targets • timelines or milestones • indicators of business performance. **9.8 How to collect, use, store and dispose of information** must include: • secure data collection • appropriate storage of information • lawful use of data • safe disposal of data.
10. Be able to plan and strategise market research to run campaigns and develop additional products or services
10.1 Key objectives may include: • increasing awareness • attracting new clients • promoting products or services. **10.3 Ways to gain and retain clients** may include: • client engagement strategies • maintaining client relationships • delivering quality service. **10.4 How a digital profile will be used** must include: • maintaining a professional online presence • use of digital platforms for promotion • managing online reputation.

Range
10.8 Regular review points may include: • scheduled review periods • monitoring progress against KPIs • evaluating business performance. **10.10 Methods of data collection** may include: • qualitative methods • quantitative methods • strengths and limitations. **10.11 Appropriate methods** may include: • suitability of methods for purpose • alignment with research objectives. **10.12 How to collect and test the data** must include: • collecting relevant data • testing validity or reliability of data • ensuring data is suitable for decision making.

NCFE assessment strategy

The key requirements of the assessment strategies or principles that relate to units in this qualification are summarised below.

The centre must ensure that individuals undertaking assessor or quality assurer roles within the centre conform to the assessment requirements for the unit they are assessing or quality assuring.

Knowledge LOs

- Assessors will need to be both occupationally knowledgeable and qualified to make assessment decisions.
- Internal quality assurers (IQAs) will need to be both occupationally knowledgeable and qualified to make quality assurance decisions.

Competence/skills LOs

- Assessors will need to be both occupationally competent and qualified to make assessment decisions.
- IQAs will need to be both occupationally knowledgeable and qualified to make quality assurance decisions.

The centre with which the learners are registered will be responsible for making all assessment decisions. Assessors must be **contracted** to work directly with the centre, contributing to all aspects of standardisation. The centre must ensure a process of training is followed, including during induction and quality assurance activities. Occupationally competent and qualified assessors from the centre must use direct observation to assess practical skills-based outcomes.

Section 3: explanation of terms

This table explains how the terms used at **level 3** in the unit content are applied to this qualification (not all verbs are used in this qualification).

Apply	Explain how existing knowledge can be linked to new or different situations in practice.
Analyse	Break down the subject into separate parts and examine each part. Show how the main ideas are related and why they are important. Reference to current research or theory may support the analysis.
Clarify	Explain the information in a clear, concise way.
Classify	Organise according to specific criteria.
Collate	Collect and present information arranged in sequential or logical order.
Compare	Examine the subjects in detail and consider the similarities and differences.
Critically compare	This is a development of 'compare' where the learner considers the positive aspects and limitations of the subject.
Consider	Think carefully and write about a problem, action or decision.
Create	Make or produce an artefact as required.
Demonstrate	Show an understanding by describing or applying knowledge in a practical context.
Describe	Write about the subject giving detailed information in a logical way.
Develop (a plan/idea)	Expand a plan or idea by adding more detail and/or depth of information.
Diagnose	Identify the cause based on valid evidence.
Differentiate	Identify the differences between two or more things.
Discuss	Write a detailed account giving a range of views or opinions.
Distinguish	Explain the difference between two or more items, resources, pieces of information.
Draw conclusions	Make a final decision or judgement based on reasons.
Estimate	Form an approximate opinion or judgement using previous knowledge or considering other information.

Evaluate	Examine strengths and weaknesses, arguments for and against and/or similarities and differences. Judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Reference to current research or theory may support the evaluation.
Explain	Provide detailed information about the subject with reasons showing how or why. Responses could include examples to support these reasons.
Extrapolate	Use existing knowledge to predict possible outcomes that might be outside the norm.
Identify	Select, recognise and name the main points accurately.
Implement	Explain how to put an idea or plan into action.
Interpret	Explain the meaning of something.
Judge	Form an opinion or make a decision.
Justify	Give a satisfactory explanation for actions or decisions.
Perform	Carry out a task or process to meet the requirements of the question.
Plan	Think about and organise information in a logical way using an appropriate format.
Provide	Identify and give relevant and detailed information in relation to the subject.
Reflect	Learners should consider their actions, experiences or learning and the implications of this for their practice and/or professional development.
Review and revise	Look back over the subject and make corrections or changes.
State	Give the main points clearly in sentences or paragraphs.
Summarise	Give the main ideas or facts in a concise way.
Test	Complete a series of checks utilising a set procedure.

Section 4: support

Support materials

The following support materials are available to assist with the delivery of this qualification and are available on the NCFE website:

- learning resources
- Qualification Factsheet.

Other support materials

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

Products to support the delivery of this qualification may be available. For more information about these resources and how to access them, please visit the NCFE website.

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To continue to improve our levels of customer service, telephone calls may be recorded for training and quality purposes.

Appendix A: units

To simplify cross-referencing assessments and quality assurance, we have used a sequential numbering system in this document for each unit.

Mandatory units

Unit number	Regulated unit number	Unit title	Level	Credit	GLH
Unit 01	M/651/4025	Applied anatomy and physiology for exercise and fitness	3	6	45
Unit 02	R/651/4026	Principles of nutrition for exercise and health	3	6	45
Unit 03	T/651/4027	Understanding lifestyle, wellbeing and common medical conditions	3	5	35
Unit 04	Y/651/4028	Encouraging positive health and fitness behaviours	3	5	35
Unit 05	A/651/4029	Programme design and delivery for personal training	3	9	60
Unit 06	H/651/4030	Professionalism and business acumen for personal trainers	3	6	35

The units above may be available as stand-alone unit programmes. Please visit the NCFE website for further information.

Change history record

Version	Publication date	Description of change
AIQ007190	1 May 2026	Document published.
AIQ007266	18 June 2026	Credit value added to qualification to support use within Welsh apprenticeship programmes. No changes to qualification content, assessment requirements, GLH or TQT.
v3.0	November 2026	Qualification title changed and template updated to new version. Minor wording updates have been made to assessment criteria (AC) to improve clarity and consistency. No changes to learning outcomes (LOs) guided learning hours (GLH), credit or content requirements.