

Sample Assessment Materials (SAMs) (holistic)

**NCFE Level 2 Certificate in Artificial Intelligence
(AI) for the Workplace
QN: 610/7672/7**

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Introduction

The following sample tasks are for internal assessment purposes and are examples of how assessment can be combined for similar content from all units for the Level 2 Certificate in AI in the Workplace. These tasks are not mandatory. You can contextualise the tasks to suit the needs of your learners to help them build up their portfolio of evidence. The tasks have been designed to cover the learning outcomes (LOs) for a range of units and provide opportunities for stretch and challenge.

When planning the sequence of delivery of the certificate, it may help you to look at the assessment tasks first. Tasks have been designed to maximise opportunities for holistic assessment so some themes may be taught more widely.

Centres may adapt the vocational context and evidence types to suit learner and employer needs, provided assessment criteria (AC) coverage is maintained.

TrailPoint Adventures outdoor activity centre

TrailPoint Adventures is an outdoor activity centre offering kayaking, climbing, hiking and team-building activities for schools, families, tourists and businesses.

The organisation has recently started introducing AI tools to support customer communication, marketing, administration and business planning. Managers want staff to use AI confidently while ensuring information remains accurate, customers are protected and workplace policies are followed.

You have recently joined TrailPoint Adventures as a member of the operations team. During your induction you will complete a series of workplace activities that demonstrate how AI can be used safely, responsibly and effectively in different parts of the business.

As you complete each activity, you should apply your own judgement when using AI tools and follow TrailPoint Adventures' workplace procedures.

Task 1: staff AI information guide

Scenario

As part of your induction, you have been asked to produce a short information guide for new members of staff explaining how AI could be used within TrailPoint Adventures.

The guide will help new employees understand:

- what AI is
- how it is used within the business
- how to use AI safely and responsibly
- why human judgement remains important.

The guide will become part of the organisation's staff induction pack and should include the following sections:

a) Understanding AI.

Provide the following:

- i. a definition of what AI is
- ii. examples of how AI is used in everyday life within TrailPoint Adventures
- iii. examples of workplace activities where AI could support staff including ethical risks.

(Unit 01 AC1.1 to 1.2 and Unit 04 AC2.4)

b) AI tools that could be used within TrailPoint Adventures.

- i. Describe common AI tools that could support activities such as:
 - customer communication
 - administration
 - marketing
 - activity planning.

(Unit 02 AC3.2)

- ii. For each example explain the capabilities of the AI tool, including:
 - text and language
 - data and analytics
 - automation and productivity
 - creativity and design
 - coding and technical support.

(Unit 02 AC1.1)

- iii. Explain how the following characteristics may affect AI-generated outputs:
 - probabilistic outputs
 - limited context
 - pattern matching rather than understanding
 - sycophancy
 - tendency to guess.

(Unit 02 AC1.2)

c) Provide simple definitions for the following key AI concepts:

- i. applications:
 - agentic AI
 - generative AI
 - conversational AI
 - large language models (LLMs)
- ii. techniques:

- machine learning (including deep learning)
- natural language processing (NLP)
- AI-driven automation.

(Unit 01 AC1.3)

- d) Explain what is meant by ethical and responsible use of AI within TrailPoint Adventures. Your guide should explain why staff should:
- i. minimise bias
 - ii. promote fairness
 - iii. remain accountable for AI-assisted work
 - iv. be transparent where AI has contributed to workplace outputs.

Include examples relevant to TrailPoint Adventures (Unit 04 AC1.1).

- e) You have been provided with examples of customer communications and promotional content (see Appendix 1). Some have been created using AI, some have been written by a member of staff, and some have been edited by a member of staff after being generated by AI.

Review each example and:

- i. identify indicators that suggest AI may have been used
- ii. explain how AI-generated content could influence customer confidence
- iii. explain why, before using AI-generated information, it is important to review:
 - the source
 - the intended purpose
 - the accuracy
 - the reliability.

Use appropriate checking methods to determine content authenticity and if it is suitable for use.

Select the most appropriate next action for the outputs (giving reasons) for each example:

- accept
- edit
- reject
- verify / escalate.

(Unit 01 AC2.1 to 2.2, 3.3 to 3.4 and Unit 05 AC2.3)

- f) Explain how AI detection tools can support checking activities. Include limitations of AI detection tools and the following capabilities:

- false positives
- false negatives
- edited content.

(Unit 01 AC3.1 and 3.2)

Submission

Staff information guide and annotated examples of AI-generated content.

Delivery and assessment guidance

Learners may use appropriate AI tools to support evidence generation. For Task 1 (e), tutors will need to provide examples of customer communications (AI-generated, human-generated or a combination). The examples provided in Appendix 1 should allow learners to demonstrate a range of workplace decisions, including accepting, editing, rejecting and verifying / escalating AI-generated content where appropriate.

Next action definitions are:

- accept – suitable to use as it is
- edit – suitable once amended
- reject – clearly unsuitable and should not be used
- verify / escalate – there is not enough information to decide. Further checks or referral to a manager are required.

Evidence may include:

- annotated examples
- completed review templates
- screenshots
- short written explanations.

Task 1 alignment

Unit 01: AC1.1 to 1.2, AC2.1 to 2.2 and AC3.1 to 3.4

Unit 02: AC1.1 to 1.2 and AC3.2

Unit 04: AC1.1 and AC2.4

Unit 05: AC2.3

Task 2: AI-supported customer communication activity

Scenario

Heavy rain is forecast for tomorrow and the afternoon kayaking sessions may need to be postponed for safety reasons.

Several customers have already booked activities and need to be informed as soon as possible. Your manager has asked you to use AI to help prepare a customer email explaining the situation. Before the email can be sent, it must be checked carefully to make sure the information is accurate, appropriate and suitable for customers.

Review the communication requirements and select an appropriate AI tool to help produce the customer email. Explain why the selected AI tool is suitable for this task (Unit 02 AC2.1 and AC3.1).

- a) Use AI to create the customer email that:
 - i. explains why the activity has been disrupted
 - ii. explains what customers need to do next
 - iii. tells customers where they can obtain further information.

Use a range of prompting techniques when using AI to create the email. You must demonstrate the use of all four prompting techniques across the outputs you create. More than one prompting technique may be used for an individual output. Clearly identify which of the following prompting techniques you used:

- zero-shot prompting
- few-shot prompting
- role prompting
- system prompting.

(Unit 02 AC3.2)

- b) Refine at least one of your prompts to improve the AI-generated output based on the initial output. Keep a record of:
 - i. the original prompt
 - ii. the refined prompt
 - iii. the original output
 - iv. the revised output.

(Unit 02 AC3.3 and Unit 05 AC3.2)

- c) Review the AI-generated email before it is sent to customers. Your review should:
 - i. explain how AI supported this task (automation, decision support or content generation)
 - ii. identify and review the requirements and effectiveness of the AI tool and prompting approach
 - iii. explain the importance of effective prompting
 - iv. identify any inaccurate, unclear or unsuitable information
 - v. explain any changes you made using your own judgement
 - vi. explain why human judgement remains important when using AI
 - vii. identify any risks if the email was sent without checking.

(Unit 02 AC4.1 to 4.2 and Unit 05 AC1.1 to AC3.3)

- d) Explain why different workplace activities may require different levels of checking and human oversight before AI-generated information is shared with customers.

Describe any barriers that could prevent effective human oversight within the workplace to include:

- i. contextual understanding

- ii. ethical responsibility:
 - bias / fairness
 - accuracy verification
 - iii. professional judgement
 - iv. accountability
 - v. specific large language model (LLM) limitations:
 - hallucinations
 - knowledge cut off
 - non-deterministic outputs.
- (Unit 05 AC1.4 and AC2.2)

Submission

Original prompts, refined prompts, original AI-generated email, final customer email and review notes.

Delivery and assessment guidance

Learners may use any suitable AI tool to complete this activity. Evidence may include:

- screenshots
- exported AI conversations
- annotated outputs
- review notes.

For Task 2 (c), learners should provide evidence of prompt refinement by submitting the original prompt, refined prompt and the corresponding AI-generated outputs.

The focus of the assessment is the learner's ability to select appropriate AI tools, apply prompting techniques, refine prompts and apply human judgement when reviewing AI-generated outputs.

Task 2 alignment

Unit 02: AC2.1 to 2.2, AC3.1 to 3.3 and AC4.1 to 4.2

Unit 05: AC1.1 to 1.4, AC2.1 to 2.3 and AC3.1 to 3.3

Task 3: update customer safety information

Scenario

TrailPoint Adventures has received updated safety guidance from the manufacturer of its buoyancy aids. The guidance includes changes to equipment fitting, age restrictions and pre-activity safety checks.

The customer information sheet provided before kayaking sessions must be updated before the weekend.

Your manager has asked you to use AI to help produce the revised information sheet. Before it is shared with customers, the content must be reviewed carefully to ensure it is accurate, suitable and reflects TrailPoint Adventures' safety procedures.

- a) Use an AI tool to update the customer information sheet using the revised safety guidance provided by your manager. Your revised information sheet should include:
 - the updated buoyancy aid guidance
 - revised safety instructions
 - any actions customers need to take before arriving.

Before the information sheet is shared with customers, explain how bias might have occurred in the information.(Unit 04 AC1.2)

- b) Describe how AI should be used safely and responsibly when producing customer safety information. In your answer include:
 - i. why transparency is important when AI contributes to workplace information
 - ii. why staff remain accountable for the final version
 - iii. how bias or inaccurate information could affect customers.

(Unit 04 AC2.1)

- c) Describe how concerns about AI-generated information should be reported or escalated within TrailPoint Adventures.

(Unit 04 AC2.3)

Submission

An AI-generated customer information sheet, final customer information sheet and review notes.

Delivery and assessment guidance

Learners may use any suitable AI tool to complete this activity. Evidence may include:

- screenshots
- exported AI conversations
- annotated outputs
- review notes.

Learners should demonstrate that they have reviewed the AI-generated customer information sheet, applied their own judgement and ensured it is accurate, suitable and ready to be shared with customers.

Task 3 alignment

Unit 04: AC1.2 and AC2.1 to 2.3

Task 4: using workplace data safely with AI

Scenario

TrailPoint Adventures stores a wide range of information to support its day-to-day operations. This includes information about:

- customers
- staff
- suppliers
- activities
- bookings
- equipment.

As more staff begin using AI tools, the manager wants everyone to understand what information can and cannot be entered into AI systems.

You have been asked to prepare a guidance document for staff explaining how workplace information should be handled when using AI tools.

- a) Identify the different types of workplace data used within TrailPoint Adventures. Include examples of:
- i. customer information
 - ii. staff information
 - iii. supplier information
 - iv. business information.

You should also explain the characteristics of these types of data and why they have different classifications in the workplace.

(Unit 03 AC1.1 to 1.3)

- b) Explain why AI systems use data. Include:
- i. why good quality data is important
 - ii. common sources of AI data
 - iii. how poor-quality data can affect AI outputs (consider accuracy, relevance, clarity and currency).

(Unit 03 AC2.1 to 2.3)

- c) Explain how workplace policies and legislation affect the use of AI. Include:

- i. UK GDPR
- ii. Data Protection Act
- iii. acceptable use policies
- iv. information security policies.

(Unit 03 AC3.1)

- d) Explain what is meant by ethical and responsible use of workplace data when using AI. Include consideration that information entered into AI tools may:

- i. be stored
- ii. be logged
- iii. be reviewed
- iv. be used to improve AI services
- v. be processed outside the organisation.

(Unit 03 AC3.2)

e) Review workplace data for AI use. Your manager has provided examples of workplace information. Examples could include:

- customer booking information
- customer medical information
- emergency contact details
- payment information
- staff qualifications
- disclosure and barring service (DBS) check information on any employee criminal convictions
- supplier contact details
- marketing mailing lists
- equipment maintenance records.

For each example:

- i. identify the type of information
- ii. classify the information
- iii. decide whether it is appropriate to use it with an AI tool
- iv. explain your decision with reference to workplace policies and relevant legislation.

(Unit 03 AC4.1)

Submission

Staff guidance document and completed workplace data review table.

Delivery and assessment guidance

Tutors should provide learners with a workplace data review table containing examples of customer, staff, supplier and business information relevant to TrailPoint Adventures.

Evidence may be presented as:

- annotated examples
- completed tables
- guidance documents
- screenshots where AI tools have been used appropriately.

Task 4 alignment

Unit 03: AC1.1 to 1.3, AC2.1 to 2.3, AC3.1 to 3.2 and AC4.1

Task 5: promote a new family adventure weekend

Scenario

TrailPoint Adventures is launching a family adventure weekend during the school holidays to encourage more local families to visit the centre.

The Marketing team wants to use AI to help create promotional material for the event. Before any content is published, it must be reviewed to ensure it is accurate, appropriate and reflects TrailPoint Adventures' values.

You have been asked to create a promotional social media post using AI and review it before publication.

- a) Use AI to create a social media post promoting the family adventure weekend. The post should:
- encourage customers to visit TrailPoint Adventures
 - provide accurate information about the event
 - reflect the organisation's values.

Before the post is published:

- i. check the information for accuracy
- ii. identify any changes you made using your own judgement
- iii. explain why TrailPoint Adventures remains responsible for the final version.

(Unit 04 AC2.1 to 2.2)

- b) Identify any ethical risks associated with using AI to create promotional content. Include consideration of:
- i. plagiarism and intellectual property rights (IPR)
 - ii. manipulation of public opinion
 - iii. potential breaches of confidentiality
 - iv. bias
 - v. jailbreaking.

Explain how the impact of these risks can be reduced before publication.

(Unit 04 AC1.4 and AC3.1)

Submission

The original AI-generated social media post, a final approved social media post and review notes.

Delivery and assessment guidance

Learners may use any appropriate AI tool to create the promotional content. Evidence may include:

- screenshots
- exported AI conversations
- annotated outputs
- review notes.

Learners should demonstrate that they have reviewed the AI-generated social media post, applied their own judgement and ensured it is suitable before publication.

Task 5 alignment

Unit 04: AC1.4 and AC2.1 to 2.2

Task 6: developing your AI skills

Scenario

You have successfully completed a range of workplace activities using AI to support customer communication, information management and business operations. Your manager is pleased with your progress and would now like you to consider how AI could continue to support TrailPoint Adventures in the future.

As part of your probation review, you have been asked to prepare a written report and a short personal development plan showing how you will continue to develop your AI knowledge and skills.

a) Explain why it is important for staff to keep their AI knowledge and skills up to date. Describe how sharing good practice can help TrailPoint Adventures use AI safely and effectively.
(Unit 06 AC1.1 to 1.2)

b) How to find reliable AI information.

Identify:

- i. two recent developments or innovations in AI
- ii. two credible sources of information that could help staff keep their AI knowledge up to date
- iii. one professional group, online community or organisation that provides information about AI.

Explain briefly how each could support your continuing professional development (CPD).
(Unit 06 AC2.1, 2.2 and 2.4)

c) Explain how AI could be used in the future to improve TrailPoint Adventures. Your answer should include examples of how AI could support:

- i. customer experience
- ii. business operations
- iii. staff productivity.

(Unit 06 AC2.3)

d) Create a personal AI development plan. Your plan should:

- i. review your current AI knowledge and skills
- ii. identify areas for development
- iii. set realistic learning goals
- iv. identify activities that will help you develop your skills
- v. explain how you will apply new knowledge safely and responsibly in your workplace.

(Unit 06 AC3.1 to AC3.3)

e) Explain the wider environmental and societal impact of planned AI use. Your explanation should include:

- i. sustainability considerations (for example, energy use, resource consumption)
- ii. exploitative practices (for example, data exploitation, unfair labour practices in data labelling)
- iii. job displacement risks and how workplaces can respond
- iv. equality, diversity and inclusion (EDI) considerations, including how AI systems may reinforce or reduce inequalities.

(Unit 04 AC1.3)

Submission

A written report and a personal AI development plan.

Delivery and assessment guidance

Evidence may be presented as:

- a completed development plan
- a short report
- a presentation
- a professional discussion record
- annotated templates.

Learners should use examples that are relevant to their own workplace role where appropriate.

Task 6 alignment

Unit 04: AC1.3

Unit 06: AC1.1 to 1.2, AC2.1 to 2.4 and AC3.1 to 3.3

Appendix 1

Task 1 (e): examples of customer communications and promotional content.

Example 1

Subject: Kayaking Session Update

Dear Customer,

Due to forecast heavy rainfall, tomorrow's afternoon kayaking session has been postponed to ensure everyone's safety.

We will contact you shortly to arrange an alternative booking. If you have any questions, please contact the bookings team.

Thank you for your understanding.

Kind regards,

TrailPoint Adventures

Example 2

Subject: Activity Optimisation Notice

Dear valued customer,

Meteorological instability has required optimisation of our recreational aquatic scheduling framework.

We appreciate your flexibility during this environmental event.

Regards,

TrailPoint Adventures

Example 3

A website states:

'TrailPoint Adventures has introduced AI-powered life jackets that automatically detect when a customer is in difficulty'.

No source or supporting information is provided.

Example 4

A customer email contains the following statement:

'All climbing sessions are completely risk free and accidents cannot happen'.

Example 5

A draft promotional leaflet states:

'Our new AI system automatically reviews customer medical information before activities to decide whether customers are fit to participate. This process has replaced the need for staff to review medical declarations'.

The member of staff reviewing the leaflet is unsure whether this statement is accurate or complies with TrailPoint Adventures' policies.

Tutor guidance

Example 1 likely observations:

- clear and accurate
- appropriate tone
- suitable for customers
- may have been AI-assisted

Most appropriate action: accept

Example 2 likely observations:

- overly formal
- does not explain what customers need to do
- reads as though AI-generated
- needs rewriting

Most appropriate action: edit

Example 3 likely observations:

- source unclear
- claim may be true or false
- needs checking before use

Most appropriate action: verify further

Example 4 likely observations:

- factually incorrect
- misleading
- unsafe claim
- could create legal issues

Most appropriate action: reject

Example 5 likely observations:

- potential data protection issue
- possible safeguarding implications
- requires management decision
- cannot be resolved by the learner alone

Most appropriate action: escalate

Change history record

Version	Description of change	Date of issue
V1.0	First publication	September 2026