



Level 2 Certificate in Gym Instructing

Learner Achievement Portfolio

FOCUSAWARDS

EDUCATE FITNESS.

Level 2 Certificate in Gym Instructing

Assessment plan and record of achievement

Centre Name:

Learner Name:

Record of achievement						
Mandatory units: Stage of assessment	Evidence	Assessment method	Planned assessment date	Pass/refer	Assessor's signature/initials and date	IV initials (if sampled)
Anatomy and physiology for exercise	Theory paper	Multiple-choice question paper				
	Worksheet	Written				
Maximising the customer experience in the exercise environment	Worksheet	Written				
Health & safety, cleaning and maintenance within a gym environment	Worksheet	Written				
Client consultation and lifestyle management	Worksheet	Written				
Planning and delivering gym-based exercise programmes	Worksheet	Written				
	Formative (Continuous) Practical Assessment	Observation				
	Summative Practical Assessment	Observation				

Assessment planning and record of achievement declaration

Declaration		Name	Signature	Date
Learners agreement:	I agree to be assessed according to the assessment plan and am happy that any additional support I require has been discussed and a separate plan put in place for this. I declare that all of the evidence (listed in the assessment plan) that will be produced for this portfolio will be my own unaided work.			
Assessors agreement	I have discussed the planned assessments with the learner and any additional support required has been planned and recorded separately.			

Records of achievement declaration

Declaration		Name	Signature	Date
Assessor 1's agreement:	I declare that all learner evidence (listed in the assessment plan) has been assessed and meets the learning outcomes, assessment criteria and evidence requirements for the qualification.			
Assessor 2's agreement: (if applicable)	I declare that all learner evidence (listed in the assessment plan) has been assessed and meets the learning outcomes, assessment criteria and evidence requirements for the qualification.			
Assessor 3's agreement: (if applicable)	I declare that all learner evidence (listed in the assessment plan) has been assessed and meets the learning outcomes, assessment criteria and evidence requirements for the qualification.			
Internal verifier's agreement:	I declare that all learner evidence (initialled in the assessment plan) has been internally verified and meets the learning outcomes, assessment criteria and evidence requirements for the qualification.			

Anatomy and physiology for exercise

1. Describe what factors can affect health and well-being?

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2. Outline the current UK physical activity guidelines for different ages (Research Question).

Young people (13 18 years)	
Adults (19 64 years)	
Older people (65+ years)	

3. Identify the five components of fitness and outline the guidelines for developing these.

Component	Guidelines for developing

4. Explain the differences between programming for physical fitness as opposed to programming for health benefits.

5. There are various principles and variables that need to be understood and applied, when designing an exercise programme. Provide a short description of how the principles of training will be applied to your clients.

Specificity
Progressive overload
Reversibility
Adaptability
Individuality
Recovery time

6. Explain the variables within the FITT principles, and how you can adapt/modify or progress each of them over time with clients.

F _____	Explanation
	How can you adapt/modify or progress
I _____	Explanation
	How can you adapt/modify or progress
T _____	Explanation
	How can you adapt/modify or progress
T _____	Explanation
	How can you adapt/modify or progress

Pass/Refer

Assessor's feedback:

Maximising the Customer Experience in the Exercise Environment

1. Identify the roles and responsibilities of the gym instructor

2. Why is member retention important and how can a fitness instructor positively influence retention? (explain your answer)

The importance of member retention

Ways in which a gym instructor can positively influence member retention

3. Why is social media important to a gym instructor and how would you manage this area?

Importance of social media						
How to set up a social media profile						
Create a simple weekly social media posting plan						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

4. How can a gym-instructor use communication techniques to engage with customers?

Verbal communication
Non verbal communication

5. Describe how you would go about promoting excellent customer service to a customer by going the extra mile

6. Explain how a gym instructor can build rapport with customers.

7. Why is it important for a gym instructor to walk the gym floor?

8. Using the feedback cycle, explain how a gym instructor can positively impact customer experience.

9. Give an example of a conflict situation that could arise in a gym environment and how you would deal with it.

10. Explain Continuing Professional Development (CPD) and why it is important to a gym instructor.

11. Describe ways in which a gym instructor can help meet the needs of customers in a fitness facility.

12. Give examples of how you would adapt your communication to meet the individual needs of different customer groups.

Individuals

Small groups
Large groups

13. Describe the customer service promise, products and services offered in your local fitness facility (Research question).

Fitness facility name		
Products and services offered	Main products/services	Specialist products/services
Membership options and contracts available		
Identify 3 demographics of club users and how they affect the services on offer (what do these customer groups want to gain from joining the gym. Consider customer needs, expectations and aspirations)		
Description of the customer journey, from entering the club for the first time to becoming an established member		

Pass/Refer

Assessor's feedback:

Health & safety, cleaning and maintenance within a gym environment

1. Explain the policies and procedures that are relevant to the role of the gym instructor, within the gym environment.

Health and safety at work act (1974)

Management of health and safety at work regulations (1999)

Employers' liability (compulsory insurance) act (1969)

Health and safety (first aid) regulations (1981)

2. Explain how to work within the boundaries of own professional knowledge and competence.

3. Complete a risk assessment for your own gym, following the five steps to risk assessment

	Risk Assessment Stage	Consideration
1		
2		
3		
4		
5		

4. What are the legal and regulatory requirements a gym instructor must follow, when it comes to health and safety, cleaning and maintenance within a gym environment?

5. What PPE equipment is necessary when working in a gym based environment?

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6. What tasks would you include in a gym cleaning rota?

Gym	
Studio	
Changing rooms	
Reception and lounge area	

7. Describe how you would dispose of different types of waste in a gym environment (in line with organisational procedures, environmental policy/considerations and COSHH).

Pass/Refer

Assessor's feedback:

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Client consultation and lifestyle management

1. Why are client consultations an important part of the customer experience and how can a gym instructor collect appropriate client information?

2. Describe two different methods of gathering information for health screening purposes, prior to undertaking exercise and their importance.

Method 1	
Description and importance	
Method 2	
Description and importance	

3. What is the process for gaining informed consent?

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4. Identify 3 health issues that will result in a client not being able to be trained by a gym instructor

5. Explain one risk stratification model and explain how it can be used to assess risk

Risk stratification model	How it can be used to assess risk

6. Give 3 practical assessments can be used to assess a client's baseline health and fitness?

Practical assessment 1	
Limitation	
Practical assessment 2	
Limitation	

Practical assessment 3	
Limitation	

7. What factors help gym instructors identify whether a client is low, medium or high risk, of an adverse event occurring during exercise?

8. Explain the legal and ethical implications of collecting client information.

9. Identify two other professionals to which an instructor might need to refer or signpost a client.

Other professional	When referral/signposting might be necessary	How referral/signpost will take place

10. What are the stages involved in achieving behaviour change?

1	
2	
3	
4	
5	
6	
7	
8	

11. How would you use the following approaches to support clients in changing their exercise behaviour?

Approach	How this could be used to support clients to change their exercise behaviour
Rewards	
Motivational interviewing	
Cognitive reframing	

12. How can you monitor and support your client's progress and motivation?

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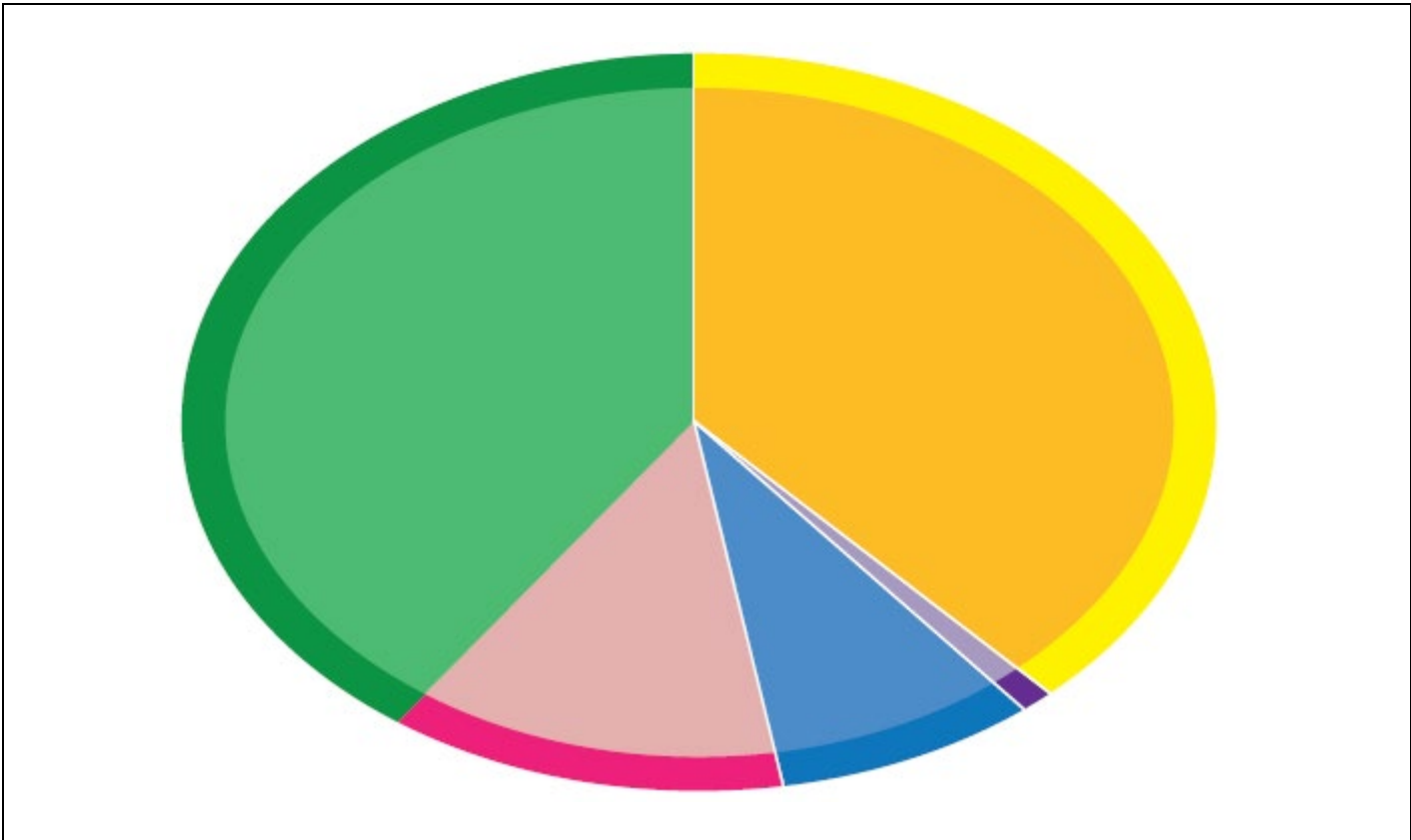
13. Describe the importance of intrinsic and extrinsic motivation in exercise adherence.

14. Explain the benefits of physical activity on health and wellbeing.

15. For each chronic health condition, explain how physical activity/exercise can help to prevent and manage these.

Coronary heart disease	
Type 2 diabetes	
Obesity	
Stroke	
Cancer	
Mental health problems	
Musculoskeletal conditions	

16. Label the Eatwell Guide below and provide examples of foods that belong to each section.



17. What are the 8 key principles of adhering to a healthy diet, recommended by the UK government?

1	
2	
3	
4	
5	
6	
7	
8	

18. Where could a gym instructor get sources of health and wellbeing advice?

19. Identify two technologies that could be used to support a client's exercise adherence.

Technology	How it can be used to support and motivate clients

Pass/Refer

Assessor's feedback:

Planning and delivering gym-based exercise programmes

1. Explain the 3 phases of effective instruction and supervision.

1	
2	
3	

2. Explain the IDEA principle

I _____	
D _____	
E _____	
A _____	

3. Why is it important that a gym instructor uses evidence-based practices?

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Assessor's feedback:

Individual client session planning and instruction

Guidance for selecting a client

Your client must be:

- A real person, with specific and legitimate goals agreed with you, the learner, which will also form part of the summative assessment
- Apparently healthy and have no medical conditions which would be considered outside of a gym instructor's or personal trainer's scope of practice and able to take part in the planned session
- In the event of an unforeseen circumstance that means the client cannot participate in your summative observed session, another person can take their place; however the following criteria must be met:
- The replacement client must be apparently healthy and have no medical conditions which would be considered outside of a gym instructor's or personal trainer's scope of practice and able to take part in the planned session, or able to take part following reasonable adaptations.

When using a replacement client you must make any planning adaptations prior to the summative observed session and be prepared to adapt the actual session as it progresses.

All observed summative exercise sessions must take place within an environment appropriate for the client and planned session.

All of the assessment documentation and checklists have been developed to ensure that the learner is able to plan and instruct sessions designed to meet their client's goals, whilst also being able to monitor intensity, motivation, effectiveness and make the appropriate adaptations to ensure that their client is able to progress towards their goals, providing client-focused results and customer satisfaction.

*** Formative (Continuous) and Summative observation guidance**

A formative (continuous) observation is a flexible assessment format which allows the completion of an assessment on one or more occasions. For example, the consultation assessment may involve your assessor observing the whole consultation with your client in one session, or they may observe each section during different parts of the course.

A summative observation is where the assessment takes place on one occasion. For example, the programme delivery will be observed and assessed in one session.

To be considered competent, the learner must be professional and adhere to legal and organisational requirement at all times. During your observations you must demonstrate these behaviours in order for all criteria to be signed off.

Client consultation

Name of client					
Date of birth		Gender			
Physical assessment					
Height		Weight		BMI	
Client barriers					
Client motivators					
Health history					
Lifestyle, occupation and hobbies					
Exercise preferences					

Client's overarching goals	
SMART goals	
Short-term	
Medium-term	
Long-term	
How will goals be reviewed?	
Short-term	
Medium-term	
Long-term	

Formative (Continuous) Assessment

- The consultation is a formative (continuous) assessment, which means it can be assessed over time or in one attempt
- This observation can be assessed by recorded video submission or live
- This assessment must be observed by one assessor per learner

Prepare for your exercise session with your client. During your formative (continuous) assessment, you will demonstrate the following:

Cardiovascular Equipment			
Time	Intensity	RPE	Teaching Points
1-2 mins			
2-3 mins			
3-4 mins			
4-5 mins			
5-6 mins			
6-7 mins			
7-8 mins			
8-9 mins			
9-10 mins			
Fixed Resistance Machine			
Exercise Name	Sets/Reps	Rest Time	Teaching Points

Free Weight Lifts			
Exercise Name	Sets/Reps	Rest Time	Teaching Points
Body Weight Exercise			
Exercise Name	Sets/Reps	Rest Time	Teaching Points

Step two – Formative (Continuous) observation checklist

Key: Competent mark a tick. Not competent mark a R (Two R's in any horizontal row = Referral. Competent with a comment mark a bullet point						
Instructing the group	CV	BW	FW		RM	
			FW 1	FW 2	RM	RM 2
Exercises/machines:						
Date (s):						
1. Gave technically correct demonstrations and explanations						
2. Adopted appropriate teaching positions						
3. Adapted exercises to suit client's needs (if req)						
4. Offered alternative exercises (if req)						
5. Reinforced teaching points						
6. Monitored intensity						
7 Correct lifting and passing techniques used when necessary	N/A				N/A	N/A
Result: Delete as appropriate	Pass			Refer		

Formative (Continuous) Assessment - Assessor’s feedback and questions

Criteria	Assessor Feedback

Formative (Continuous) Assessment - Assessor’s feedback and questions

Criteria	Assessor Feedback

Summative Assessment

During your summative assessment you will demonstrate the following: (all exercises should be selected from your programme card and none of the excises can be repeated from your formative (continuous) assessment)

Client name		Instructor	
Duty first aider		Nearest telephone	
Location of first aid kit			
Safety checks			
Warm Up CV			
Time	Intensity	RPE	Teaching Points
1-2 mins			
2-3 mins			
3-4 mins			
4-5 mins			
Warm Up Stretches			
Exercise Name	Reps/ Time Held	Dynamic/ Static	Teaching Points
Fixed Resistance Machine			
Exercise Name	Sets/Reps	Rest Time	Teaching Points

Free Weight Lifts			
Exercise Name	Sets/Reps	Rest Time	Teaching Points
Body Weight Exercise			
Exercise Name	Sets/Reps	Rest Time	Teaching Points
Cooldown CV			
Time	Intensity	RPE	Teaching Points
1-2 mins			
2-3 mins			
3-4 mins			
4-5 mins			
Cooldown Stretches			
Exercise Name	Reps/ Time Held	Dynamic/ Static	Teaching Points

Learner Guidance: Please include a minimum of 1 developmental stretch and 1 maintenance stretch

Summative observed session checklist

Preparing and introducing the session										✓ / x
1. Welcomed the client to the session										
2. Delivered a tour and answered customer enquiries effectively										
3. Signposted client to services/areas of facility (e.g. water fountains, emergency exits, etc)										
4. Ensured PARQ and verbal screening is completed										
5. Gave an overview of what the session will involve										
Key: Competent mark a tick. Not competent mark a R (Two R's in any horizontal row = Referral. Competent with a comment mark a bullet point)										
Delivering the exercise session										
	WU CV	WU Stretches	RM 1	RM 2	FW 1	FW 2	BW 1	BW 2	CD CV	CD stretches
Exercise used										
5. Gave technically correct demonstrations and explanations										
6. Adopted appropriate teaching positions										
7. Adapted exercises to suit client's needs										
8. Observed the client and corrected their technique where necessary										
9. Purpose and value of exercise explained										
10. Motivated and encouraged client										
11. Offered alternative exercises if necessary										
12. Reinforced teaching points and provided feedback										
13. Gained feedback from client										
14. Monitored intensity										
15. Correct lifting and passing technique used when necessary										
16. Exercise conducted in a safe and timely manner										
Ending the session										
17. Gave constructive feedback to the client based on their performance										
18. Gained feedback from the client as to how well their goals were met and how effective the planned activities were										
19. Gained feedback from the client as to how effective the motivational and instructional styles were										
20. Used appropriate cleaning substances and equipment, Checking that the environment and equipment was left in good order										
Result (Pass/Refer)		Assessor Sign				Date				

Summative Assessment - Assessor’s feedback and questions

Criteria	Assessor Feedback

Summative Assessment - Assessor’s feedback and questions

Criteria	Assessor Feedback

Session self-evaluation

1. How did you gather feedback from your client to review and evaluate your practice?

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2. Give two examples of feedback provided by the client that you will use to review and evaluate your practice.

3. Describe two ways in which your instructional skills were effective for meeting the client's needs.

4. Describe two ways in which your instructional skills could be improved to meet the client's needs.

5. Describe two ways in which your communication was effective for meeting the client's needs.

6. Describe two ways in which you could improve your communication skills to meet the client's needs.

Result Pass/Refer

Assessor's feedback:

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Educate Fitness Appeals and Complaints Procedure

Your Teaching and Learning Mentor will provide you with help and advice with regard to the requirements of your award. This may take the form of giving you assignments and/or activities to check your understanding. The training that you receive will be individually planned to suit your needs.

We hope that all feedback given to you will be constructive and clear and will encourage you to complete the work for your award as effectively as possible.

If you are not happy with any aspect of your programme we will do our best to help you deal with the issue. This may mean talking to your Teaching and Learning Mentor on your behalf to help overcome the problem.

Your Teaching and Learning Mentor will do their best to support you, however we do appreciate that there may be times that issues arise that you would prefer not to discuss with your Teaching and Learning Mentor.

If for any reason you disagree with a decision made by your Teaching and Learning Mentor you have the right to appeal that decision. How to do this is written below.

What you can do if you don't agree with your Teaching and Learning Mentor's decision

If you feel that you have been unfairly treated or you do not agree with an assessment decision that has been made you should follow the procedure below:

- You should express your concerns directly to your Teaching and Learning Mentor, stating what the problem is so that the Teaching and Learning Mentor can explain their decision to you.
- If an agreement cannot be reached, you can arrange to discuss the issue with your Internal Verifier.
- If an agreement cannot be reached at this stage you should contact the Lead Internal Verifier in order to reach an agreement.
- If you decide you want to appeal the assessment decision you have the right to do so but your appeal must be emailed to: appeals@educatefitness.co.uk. Your appeal must be received within 5 days of the assessment decision.

Physical Activity Readiness Questionnaire (PAR-Q)

Name: _____ Date of Birth: _____

Address: _____

Have you had any of the following: (Tick box)

	Yes	No
Heart problems		
Joint problems		
Fainting spells		
Epilepsy		
Pain in chest when exercising		
Back complaints		
High blood pressure		
Low blood pressure		
Are you on any medication?		
Diabetes		
Any breathing difficulties/asthma		
Are you pregnant		
Any other significant illness, recent or serious operations		

If yes, give details: _____

If you have answered yes to any of the above questions, you should consult your doctor for advice.

If any of the above change in the future, please inform your fitness instructor immediately. The above questionnaire has been devised to aid you in assessing your state of health before commencing your workout.

Informed Consent

I wish to embark on a programme of physical activity including weight training and the use of various aerobic conditioning machinery. I hereby affirm that I do not suffer from any condition which prevents my participation in an exercise programme.

I hereby release my trainer from any claims, demands and causes of action arising from my participation in this exercise programme, I agree to abide by the conditions of use as stated in this document.

I fully understand that should I injure myself as a result of exercise participation that I hereby release my trainer from any liability now or in the future.

Signed: _____ Date: _____

Name: _____