



Learner  
Achievement  
Portfolio

# Active IQ Level 4 Certificate in Advanced Personal Training

Qualification  
Accreditation Number:  
**603/1539/8**  
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**Active iQ**

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# Active IQ Level 4 Certificate in Advanced Personal Training

## Assessment plan and record of achievement

Assessment Plan				Record of Achievement			
Mandatory units	Stage of assessment	Evidence	Assessment method	Planned assessment date	Pass/refer % score for exams	Assessor's initials and date	IV initials and date
1	Applied techniques to support, enhance and manage the client journey	Formative viva - 1	Q&A				
		Formative viva - 2	Q&A				
2	Progressing clients towards successful achievement of goals	Case study	Written				
		Presentation	Observation				
		Summative viva	Q&A				

### Assessment planning and record of achievement declaration

Declaration	Name	Signature	Date
<b>Learner's agreement:</b> 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.			
<b>Assessor's agreement:</b> I have discussed the planned assessments with the learner and any additional support required has been planned and recorded separately.			

### Record of achievement declaration

Declaration	Name	Signature	Date
<b>Assessor 1's agreement:</b> 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.			
<b>Assessor 2's agreement:</b> (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.			
<b>Assessor 3's agreement:</b> (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.			
<b>Internal verifier's agreement:</b> 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.			

## Applied techniques to support, enhance and manage the client journey

Unit accreditation number: Y/615/7305

## Progressing clients towards successful achievement of goals

Unit accreditation number: K/615/7308

### Case study, presentation and vivas

The assessment for this qualification involves working with a client throughout their personal training journey in a manner which facilitates their progression towards the successful achievement of their goals.

Over the course of the case study you will need to:

- Perform an initial consultation including relevant baseline assessments.
- Set client- and goal-specific SMART (specific, measurable, achievable, realistic/relevant and time-bound) goals.
- Plan a client- and goal-specific periodised programme which spans at least three mesocycles and facilitates achievement of the client's long-term goals.
- Work with your client for at least 12 weeks whilst recording all sessions, modifications, adaptations, progressions, reassessments, results and any other relevant notes in a professional manner.
- Discuss the client's journey through the plan on at least three occasions, presenting relevant supporting notes and explaining the client's progression and any actions you have taken to maximise it.

You will need to produce your case study and prepare for your presentation and vivas using the following guidance:

#### Selecting the client

In order to complete all the required elements of this assessment you must select an appropriate client for your case study. Your client must be:

- A real person who will be your client throughout the case study.
- Apparently healthy and have no medical conditions which would be considered outside the scope of practice for a personal trainer with your qualifications.

#### Initial consultation and assessment

At the start of the case study you must evaluate a client's lifestyle demands, needs and personal goals using appropriate techniques and methods. You must carefully select, collect and record the techniques and methods used, justifying why these assessments are relevant and appropriate for your client, specifically.

It is highly recommended that you use multiple screening and assessment methods to create an accurate picture of your client. This aids your evaluation of client progress and achievement throughout the case study.

In order to complete all the required elements of this assessment, you must:

- Evaluate the purpose, risks and benefits of assessments performed to measure a client's current capabilities.
- Justify assessment selections using credible and current information sources.
- Describe the selected protocols of health, lifestyle and functional movement screening methods and physiological fitness tests in a client-friendly manner.
- Explain the purpose, risks and benefits of the planned assessments in a client-friendly manner.
- Discuss and agree assessment methods with the client to obtain appropriate informed consent.
- Perform the assessments, following protocol accurately to ensure validity, reliability and accuracy of results.
- Analyse the data collected to accurately identify the client's current capabilities.
- Evaluate the client's lifestyle demands and current capabilities to highlight key areas for development.
- Record all information collected in a manner that adheres to legal and professional requirements.

## Planning a long-term periodised programme

Using the information collected during the initial consultation and assessment process, you must:

- Develop and agree short-, medium- and long-term goals (that are informed by all relevant information collected) with the client.
- Develop and agree a strategy to measure and monitor client progress at appropriate points in the programme.
- Design a long-term plan (at least 3 mesocycles) that will effectively facilitate the achievement of your client's long-term goals (macrocycle).
- Break the annual plan into appropriate meso and microcycles that will effectively facilitate the achievement of your client's medium- and short-term goals.
  - **N.B.** Microcycles within a specific mesocycle should, when combined, facilitate the achievement of short- and medium-term goals. Mesocycles within a specific macrocycle should, when combined, facilitate the achievement of medium- and long-term goals.
- Justify how each stage of programming will facilitate the achievement of your client's short-, medium- and long-term goals using credible and current information sources.
- Discuss and agree periodised plans with the client to obtain appropriate informed consent.

## Coaching your client to optimise goal achievement

You must work with your client for a minimum of 12 weeks, maintaining effective, clear, client-friendly, professional records detailing all programmes, session plans, modifications and training notes. Your records and notes must include:

- Session plans that have been designed to minimise the risk of injury or overtraining, whilst optimising progression towards the achievement of your client's specific goals.
- Justification of how sessions have contributed to the achievement of your client's goals using credible and current information sources.
- Descriptions of the methods used to collect relevant information during the client journey, for example:
  - Performance data (e.g. wearable technology data, adherence records, social media interactions or client reports and reflections).
  - Reassessments.
  - Client feedback.
  - Self-reflection.
- Analysis and evaluation of the relevant information collected during sessions to highlight effects on progression towards goal achievement.
- Explanations and specific examples of how you have:
  - Adapted your communication to ensure client understanding of all rules, techniques and instructions.
  - Used appropriate verbal, visual and kinaesthetic cues to optimise performance whilst ensuring safe and effective technique and movement quality.
  - Observed and monitored client performance, intensity and feedback.
  - Analysed and responded to client performance, intensity and feedback to identify appropriate modifications.
  - Implemented modifications in response to client performance, intensity and feedback.

## Presenting your case study and findings

You will be assessed on a number of occasions over the course of the case study period, including:

- At least two formative vivas.
- Summative submission of the written case study, a presentation and a viva.



## Formative vivas

You will be assessed on at least two occasions in a formative viva.

Prior to each formative viva, you must present your assessor with all assessments, programmes, session plans and notes made during the case study so far.

### For example:

The information presented prior to the first ongoing viva is likely to include plans and notes that explain:

- Initial consultation, screening and assessment findings.
- Annual periodisation plans, goals and strategies.
- Session plans, client performance and modifications made in the first four weeks of training your client.

The vivas are an opportunity for you to give a verbal defence/explanation/justification of the plans made and actions taken so far with the client. Viva questions will therefore be directly related to the information you have provided to the assessor prior to the assessment. Viva answers should always be given with the specific client in mind and explain how your plans/actions have affected their progression towards goal achievement.

Each viva will be chronological in nature and the assessor will ask questions that allow demonstration and verification of the client journey.

### For example:

The assessor may ask you about how the client has responded to the training sessions held in the first four weeks of the case study.

The learner explains that, so far, the client has found the exercises easy and as such the goals have been re-evaluated and sessions amended to reflect this. During the discussion, the learner explains three specific plan modifications that have been made in response to client performance.

During the next ongoing viva, the assessor asks about how the three specific plan modifications have facilitated more appropriate client progression.

## Summative case study assessment

At the end of the case study period, you must collate all records, results and notes to create a case study and presentation to explain and justify the client's personal training journey. These must include the following:

- An overview of the initial consultation and assessment process, including relation to key findings which informed planning and delivery throughout the case study period.
- An overview of the planning process, including explanation of the key aspects of the plans (e.g. programme, sessions and modifications) that had an effect on the client's journey.
- An overview of the coaching process, including explanation of the key aspects that had an effect on the client's journey.
- Information used to support, enhance and manage the client's journey, including:
  - The research questions that were formulated to provide focus when investigating information for your client.
  - An evaluation and critical analysis of the information used to develop your plans, programmes, sessions and modifications (e.g. what information was sourced and how it was relevant and useful for informing your practice with your client).
  - How and where you accessed the information used.
  - How you ensured the information was credible, current and relevant to your client and their goals.
  - Differentiation between quantitative and qualitative information used.
  - Advantages and limitations of the different sources of information used.
  - How you presented the information in a client-friendly manner and how you linked the information to the client's wants, needs and goals to maximise its benefits.
  - How the information used could support own continuing professional development and other personal training clients in future.

- Technologies used to support, enhance and manage the client's journey, including:
  - The technologies that were used with your client (e.g. wearables, social media, applications, video analysis tools, software and hardware or retention tools) and the reasons for your selections.
  - The specific information that was provided by technologies and how it was used to inform personal training practice and the client journey.
  - How the technologies were used, interpreted and integrated to ensure the client's journey was supported, enhanced and managed, to include:
    - Client retention.
    - Client outcomes, adherence, progression and goal achievement.
  - An evaluation of the methods used to interpret and integrate data gathered from technologies, including:
    - Identification of methods that worked and didn't work.
    - Reasons why methods worked or didn't work.
    - How you adapted methods of interpretation and integration to ensure maximum benefit for your client.
    - How methods of interpretation and integration could be adapted, or improved, to maximise future benefits.
  - An evaluation of your current digital/social media profile including ways in which it affected your relationship with your client and any improvements that could be made to present a more positive digital/social media profile in future.
- Behaviour change theories and communication techniques used to support, enhance and manage the client journey, including:
  - Explanation of the techniques and theories considered for use during the case study period.
  - An evaluation of the behaviour change and communication strategies (e.g. theories and techniques) used, including:
    - Identification of strategies that worked and didn't work.
    - Reasons why the strategies did or didn't work.
    - How the strategies were adapted to ensure maximum benefit for your client.
    - How the strategies could be adapted, or improved, to maximise future client benefits.

A reference list must be produced to support this presentation. The reference list must detail all sources of information used throughout your case study to make decisions relating to any aspect of assessment, planning or delivery of PT sessions and programmes.

The presentation must be a minimum of 10 and a maximum of 20 minutes long. You can include supporting information in any format, for example:

- PowerPoint or Prezi presentations.
- Digital personal training, assessment and analysis tool data.
- Videos, images, audio recording.
- Written or digitally produced charts, tables or images.
- Client records, programme cards, session plans and notes.



At the start of your presentation, at least one accessible version of all case study notes and each piece of supporting information (including reference list) must be given to your assessor, for example:

- Assessment records, periodised plans, session plans, record cards and client evaluation notes.
- Printed handout/leaflet.
- A memory stick with a copy of the presentation, videos, images and all associated records.
- A printout or electronic screen print of any web pages, etc.
- A copy of all records compiled, case study notes and supporting information must be included in your portfolio.

At the end of your 10-15-minute presentation, your assessor will ask you a number of questions relating to your case study. This is your opportunity to further explain aspects of your case study and presentation that the assessor feels need clarification or expansion.

**N.B.** Viva questions will only relate to details you have discussed as part of your formative vivas, presentation or supporting documentation.

## Formative viva mark scheme

Viva – stage 1		
<b>Supporting evidence provided prior to viva (e.g. assessment results, programmes, session plans)</b>		
Viva questions	Viva answers	
<i>Explain your client's personal training journey so far.</i>		
Did the learner:	Possible marks	Actual marks
Provide all assessments, programmes, session plans and notes made so far?	<b>1</b> (minimum 1 mark)	
Explain the findings of the case study so far in a clear manner?	<b>1</b> (minimum 1 mark)	
Accurately link the findings of the case study so far to the client's wants, needs and goals?	<b>1</b> (minimum 1 mark)	
Demonstrate an understanding of the client and their needs, wants and goals?	<b>1</b> (minimum 1 mark)	
Demonstrate an understanding of how the plans and actions of the PT have affected the client and their performance, progress and adherence?	<b>1</b> (minimum 1 mark)	
<b>Result total</b> /5 (5 marks in total, with the minimum set marks achieved for each section required to pass)		
<b>Pass / Refer</b>		

<b>Viva – stage 2</b>		
<b>Supporting evidence provided prior to viva (e.g. assessment results, programmes, session plans)</b>		
<b>Viva questions</b>	<b>Viva answers</b>	
<i>Explain your client's personal training journey since the last viva.</i>		
<b>Did the learner:</b>	<b>Possible marks</b>	<b>Actual marks</b>
Provide all assessments, programmes, session plans and notes made so far?	<b>1</b> (minimum 1 mark)	
Explain the findings of the case study so far in a clear manner?	<b>1</b> (minimum 1 mark)	
Accurately link the findings of the case study so far to the client's wants, needs and goals?	<b>1</b> (minimum 1 mark)	
Demonstrate an understanding of the client and their needs, wants and goals?	<b>1</b> (minimum 1 mark)	
Demonstrate an understanding of how the plans and actions of the PT have affected the client and their performance, progress and adherence?	<b>1</b> (minimum 1 mark)	
<b>Result total</b> /5 (5 marks in total, with the minimum set marks achieved for each section required to pass)		
<b>Pass / Refer</b>		

**Assessor's feedback:**

## Summative case study mark scheme

<b>General case study criteria</b>			
<b>Did the learner:</b>	<b>Possible marks</b>	<b>Case study marks</b>	
Obtain appropriate informed consent for the planned assessments, exercises and sessions?	<b>1</b> (minimum 1 mark)		
Use credible and current sources of information to justify all decisions made during the client journey?	<b>6</b> (minimum 4 marks)		
Produce accurate records and notes that are client-friendly and professional, and meet legislative requirements?	<b>3</b> (minimum 2 marks)		
<b>Result total /10</b> (8 marks in total, with the minimum set marks achieved for each section required to pass)			
<b>Pass / Refer</b>			
<b>Assessor's feedback:</b>			
<b>Initial consultation and assessment</b>			
<b>Did the learner:</b>	<b>Possible marks</b>	<b>Case study and presentation marks</b>	<b>Viva marks</b>
Provide all initial consultation and assessment records and notes?	<b>1</b> (minimum 1 mark)		
Evaluate the purpose, risks and benefits of assessments performed to measure a client's current capabilities?	<b>3</b> (minimum 2 marks)		
Justify assessment selections?	<b>3</b> (minimum 2 marks)		
Accurately describe the protocols of selected health, lifestyle and functional movement screening and physiological fitness tests in a client-friendly manner?	<b>3</b> (minimum 2 marks)		
Analyse and evaluate the data collected to highlight key areas for development?	<b>6</b> (minimum 4 marks)		
<b>Result total /16</b> (13 marks in total, with the minimum set marks achieved for each section required to pass)			
<b>Pass / Refer</b>			
<b>Assessor's feedback:</b>			





Analyse and evaluate the relevant information collected during sessions to highlight the progressive effects?	<b>6</b> (minimum 4 marks)		
Explain and give specific examples of how communication was adapted to ensure client understanding of rules, techniques and instructions?	<b>3</b> (minimum 2 marks)		
Explain and give specific examples of how verbal, visual and kinaesthetic cues have been given to optimise performance whilst ensuring safe and effective technique and movement quality?	<b>3</b> (minimum 2 marks)		
Explain and give examples of ways in which client observation and monitoring have been analysed and implemented to provide appropriate responses to client performance, intensity and feedback?	<b>3</b> (minimum 2 marks)		
<b>Result total /28</b> (23 marks in total, with the minimum set marks achieved for each section required to pass)			
<b>Pass / Refer</b>			
<b>Assessor's feedback:</b>			
<b>Information to support client journey</b>			
<b>Did the learner explain and justify:</b>	<b>Possible marks</b>	<b>Case study and presentation marks</b>	<b>Viva marks</b>
How research questions were formulated?	<b>3</b> (minimum 2 marks)		
How evaluation and critical analysis of the information was used?	<b>3</b> (minimum 2 marks)		
How and where the information was accessed?	<b>1</b> (minimum 1 mark)		
The differentiation between quantitative and qualitative information?	<b>1</b> (minimum 1 mark)		
The advantages and limitations of the sources used?	<b>3</b> (minimum 2 marks)		
How the information was presented in a client-friendly manner?	<b>1</b> (minimum 1 mark)		
How the information is linked to the client's wants, needs and goals to maximise the benefits?	<b>1</b> (minimum 1 mark)		
How the information could support their own continuing professional development and future use?	<b>1</b> (minimum 1 mark)		
<b>Result total /14</b> (12 marks in total, with the minimum set marks achieved for each section required to pass)			
<b>Pass / Refer</b>			

**Assessor's feedback:**

**Technology to support the client's journey**

<b>Did the learner:</b>	<b>Possible marks</b>	<b>Case study and presentation marks</b>	<b>Viva marks</b>
Explain and justify the technologies that were used with the client?	<b>1</b> (minimum 1 mark)		
Explain and justify the information provided by technologies and how it was used to inform PT practice and the client journey?	<b>3</b> (minimum 2 marks)		
Explain and justify how technologies were used, interpreted and integrated to ensure the client's journey was supported, enhanced and managed?	<b>3</b> (minimum 2 marks)		
Provide an evaluation of the methods used to interpret and integrate data gathered from technologies?	<b>3</b> (minimum 2 marks)		
Provide an evaluation of their current digital/ social media profile and suggestions for how it could be improved in the future?	<b>3</b> (minimum 2 marks)		

**Result total /13** (11 marks in total, with the minimum set marks achieved for each section required to pass)

**Pass / Refer**

**Assessor's feedback:**

**Behaviour change and communication techniques to support the client's journey**

<b>Did the learner:</b>	<b>Possible marks</b>	<b>Case study and presentation marks</b>	<b>Viva marks</b>
Explain the techniques and theories considered for use during the client journey?	<b>3</b> (minimum 2 marks)		
Evaluate the behaviour change and communication strategies used during their client's journey?	<b>3</b> (minimum 2 marks)		

**Result total** /6 (5 marks in total, with the minimum set marks achieved for each section required to pass)

**Pass / Refer**

**Assessor's feedback:**

**Viva questions**

**Viva answers**

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