

Level 4 NVQ Certificate/Diploma in Business and Administration (4428-44/94)



Qualification handbook for centres

www.cityandguilds.com
November 2012
Version 1.4 (Jan 2014)

Level 4 NVQ Diploma in Business and Administration
601/1904/4

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1.4 Jan 2014	Amended Diploma rules of combination	Qualification Structure
1.3 Nov 2012	Additional units added to rules of combination	Qualification Structure

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1 Introduction to the qualifications

This document contains the information that centres need to offer the following qualifications:

Qualification title and level	City & Guilds	Qualification
Level 4 NVQ Certificate in Business and Administration	4428-94	500/9776/3
Level 4 NVQ Diploma in Business and Administration	4428-44 / 94	601/1904/4

Consult the walled garden for last registration and certification dates.

The City & Guilds Level 4 NVQ Certificate and Diploma in Business and Administration meet the needs of candidates who are employed in or wish to gain employment in a role with administrative management responsibilities. They provide the candidate with the opportunity to gain the skills to develop and implement administrative services that can be applied to a wide range of businesses and organisations. The candidate will develop an understanding of management responsibilities and gain competencies in fulfilling these through a range of activities such as resource management, negotiating, agreeing budgets and promoting innovation and change.

These competence based qualifications replace the City & Guilds 4404 Level 4 NVQ in Business and Administration which expires on 31 July 2010. These qualifications are based on national occupational standards developed by the Council for Administration (CfA) and were designed in collaboration with City & Guilds and other awarding organisations. They include imported units from the Institute of Customer Service (ICS) and the Management Standards Centre (MSC).

The Level 4 NVQ Certificate and Diploma provide the candidate with the opportunity to enter into employment in a managerial role within any type of business environment and offers progression onto further learning / training and into higher education.

Contacting the Sector Skills Councils/Standards Setting Bodies

CfA

Tel: 0207 091 9620

Fax: 0207 091 7340

Email: info@cfa.uk.com

Website: www.cfa.uk.com

ICS

Tel: 01206 571716

Fax: 01206 54668

Email: enquiries@icsmail.co.uk

Website: www.instituteofcustomerservice.com

Management Standards Centre

Tel: 0207 240 2725

Email: management.standards@managers.org.uk

Website: www.management-standards.org

1.1 Qualification structure

Level 4 NVQ Certificate in Business and Administration

To achieve the Level 4 NVQ Certificate in Business and Administration the learner must achieve

- a minimum of 30 credits overall, of which a minimum of 20 credits must be at level 4
- 20 credits from the six mandatory units in Group A
- plus a minimum of 10 credits from optional units in Group B.

Level 4 NVQ Diploma in Business and Administration

To achieve the Level 4 NVQ Diploma in Business and Administration the learner must achieve

- a minimum of 53 credits overall, of which a minimum of 35 credits must be at level 4
- 20 credits from the six mandatory units in Group A
- plus a minimum of 33 credits from optional units in Group B.

Key to table

A – Mandatory, **B** – Optional, **C** - Optional

* **Excluded combination** – indicated unit(s) cannot be taken together within any one qualification:

Unit ID	Unit accreditation	Unit title	Level	Credits	Level	Credits	Level	Credits	Group
310	M/601/2528	Develop a presentation	3	3	15				
311	T/601/2529	Deliver a presentation	3	3	15				
316	L/601/2536	Support the design and development of an information system	-	-	-				410
317	R/601/2537	Monitor information systems	3	7	30				
318	Y/601/2538	Analyse and report data	3	6	30				
319	D/601/2539	Order products and services	3	5	35				
320	R/601/2540	Plan and organise an event	3	4	28				
321	Y/601/2541	Co-ordinate an event	3	4	30				
322	D/601/2542	Plan and organise meetings	3	5	25				
323	H/601/2543	Organise business travel or accommodation	3	5	20				
324	K/601/2544	Evaluate the organisation of business travel or accommodation	-	-	-				
327	J/601/2549	Contribute to running a project	3	5	30				
328	A/601/2550	Deliver, monitor and evaluate customer service to internal customers	-	-	-				
329	F/601/2551	Deliver, monitor and evaluate customer service to external customers	-	-	-				
330	J/601/2552	Agree a budget	3	4	25				
331	D/601/1228	Use customer service as a competitive tool	3	8	53				
332	J/601/1515	Monitor and solve customer service problems	3	6	40				
401	L/601/2553	Manage and be accountable for own performance in a business environment	-	-	-				
402	R/601/2554	Evaluate and improve own performance in a business environment	-	-	-				
403	Y/601/2555	Support the purpose and values of an organisation	4	3	14				

Unit code	Unit accreditation	Unit title	Level	Credits	ECTS	Certificate	Notes
404	D/601/2556	Support sustainability in a business environment	4	3	14	A	
405	H/601/2557	Assess, manage and monitor risk in a business environment				A	
406	M/601/2562	Communicate in a business environment	4	3	25	A	
407	K/601/2558	Evaluate and solve business problems	4	6	16	B	
408	H/601/2560	Make decisions in a business environment	4	4	24	B	
409	K/601/2561	Negotiate in a business environment	4	7	40	B	
410	T/601/2563	Design and develop an information system	4	7	30	B	316
411	A/601/2564	Manage and evaluate an information system	4	6	20	B	
412	F/601/2565	Prepare specifications for contracts	4	5	30	B	
413	J/601/2566	Chair meetings	4	4	16	B	
414	L/601/2567	Manage an office facility	4	6	30	B	
415	Y/601/2569	Propose and design administrative services	4	8	36	B	
416	L/601/2570	Prepare, co-ordinate and monitor operational plans	4	6	26	B	
417	Y/601/2572	Implement, monitor and maintain administrative services				B	
418	K/601/2575	Contribute to innovation in a business environment	4	6	25	B	
419	M/601/2576	Plan change for a team	4	6	22	B	
420	T/601/2580	Manage budgets	4	5	29	B	
421	K/600/9711	Manage physical resources	4	3	25	B	
422	M/600/9712	Manage the environmental impact of work activities	4	5	10	B	
423	T/600/9601	Provide leadership and direction for own area of responsibility				B	
424	M/600/9676	Support learning and development within own area of responsibility				B	
425	K/600/9661	Develop working relationships with colleagues and stakeholders				B	
426	A/601/1236	Plan, organise and control customer service operations				B	
501	R/601/2585	Invite tenders and select contractors	5	6	32	B	
502	Y/601/2586	Monitor and evaluate contracts	5	6	35	B	
503	D/601/2587	Plan change across teams	5	6	26	B	
504	K/601/2589	Implement, monitor and review change	5	6	20	B	
505	A/601/2578	Manage a project	5	10	33	B	
506	T/600/9663	Recruit staff in own area of responsibility	5	4	25	B	
507	A/600/9759	Monitor and review business processes	5	3	20	B	
351	T/602/1912	Ensure responsibility for actions to reduce risks to health and safety	3	4	18	B	
352	J/503/92/72	Gather information for a Business Impact Analysis	3	3	8	B	
353	Y/601/8324	Operating credit control procedures	3	4	10	B	
357	T/601/8282	Support Individuals With Specific Communication	3	5	35	B	
427	F/503/9237	Assist in the design of Business Continuity	4	4	15	B	508
428	L/503/9242	Assist with the development of an organisational Business Continuity Management strategy	4	5	20	B	
429	R/600/4955	Drafting Financial Statements	4	6	55	B	
430	H/600/9674	Plan, allocate and monitor work in own area of responsibility	4	5	25	B	

Unit code	City & Guilds accreditation	Unit title	Level	Hours	Credits	Certificate	Unit value
431	H/503/9277	Raise awareness of Business Continuity Management within a team	4	4	15	B	
508	M/503/9251	Design Business Continuity Management procedures	5	10	50	B	427

Opportunities for progression

On completion of these qualifications candidates may progress into employment or to the following City & Guilds qualifications:

- Level 4 NVQ Diploma in Customer Service (4430)
- Leadership and management qualifications offered by our sister organisation ILM
www.i-l-m.com

1.2 Qualification support materials

City & Guilds also provides the following publications and resources specifically for these qualifications:

Description	How to access
Promotional materials	www.cityandguilds.com
SmartScreen (for some level 3 units)	www.smartscreen.co.uk

2 Centre requirements

This section outlines the approval processes for Centres to offer these qualifications and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres currently approved to offer the 4404 Level 4 NVQ in Business and Administration will be given automatic approval for the new Level 4 NVQ Certificate/Diploma in Business and Administration. Existing sanctions will also apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1 Resource requirements

Human resources

Staff delivering Business and Administration units within these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent to make Business and Administration assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) of for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

Centre staff may undertake more than one role, e.g. tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

a) Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications

or

b) A trainer, supervisor or manager, employed by an organisation must either:

1. hold or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications

or

2. seek guidance and approval from City & Guilds to demonstrate that the

- organisation has appropriate processes in place to facilitate assessment, moderation or verification functions

- trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

For imported units please refer to the Assessment Strategy of the relevant sector skills council/standard setting body.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualification(s) successfully.

To be awarded a Framework NVQ in Business & Administration, candidates must demonstrate that they are able to perform the job or an appropriate task competently. Competence may be demonstrated in the private sector, not-for-profit sector or public sector. Candidates may be employed as full-time, part-time, paid or voluntary members of staff.

The assessment of all units at any level of a Business and Administration Framework NVQ or competence-based qualification, '... may be based on either candidate performance at work or through simulation, as necessary'¹.

As part of the assessment for this qualification, candidates must have access to a work or realistic work environment (RWE).

Realistic work environments

Where the candidate is subjected to a work environment and is producing performance evidence subject to all of the following conditions:

- time pressures
- work problems
- accountabilities
- office environment
- tools to do the job.

e.g. learners in a model or virtual office.

External verifiers will need to approve RWEs on an individual basis before any assessment can begin. Authenticity is essential and approval needs to be endorsed on an annual basis by the external verifier.

Simulation

If a unit or part of a unit at any level is simulated, it must be undertaken in a RWE.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where

¹ See CfA Assessment Strategy 2009, Business & Administration NOS, December 2009.

- there is a high risk to the security or safety of the candidate, individuals, key people in their lives and others
- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

An example of a simulated task is one that is not going to be used by a third party but meets all the rigour of an RWE i.e. where the candidate is subjected to work timelines, prioritising, interruptions of a working environment etc.

For imported units please refer to the Assessment Strategy of the relevant sector skills council/standard setting body.

Age restrictions

These qualifications are not approved for use by candidates under the age of 18, and City & Guilds cannot accept any registrations for candidates in this age group.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification(s). This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification[s] they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification(s) they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualifications.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualifications. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements and/or notes for guidance in each unit.
- Useful material is also available from the CfA www.cfa.uk.com

4 Assessment

4.1 Summary of assessment methods

For these qualifications candidates will be required to complete the following assessments:

- a portfolio of evidence clearly indicating how each unit has been achieved

Time constraints

The following time constraints must be applied to the assessment of these qualifications:

- Assessment must be completed within the candidate's period of registration.

4.2 Evidence requirements

Evidence requirements have been included for each Business and Administration unit.

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

Naturalistic observation of workplace activities: Assessors must provide information about the context of the assessment.

Products: Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records. Assessment centres using 'paperless portfolios' should first discuss their approach to assessment with their awarding organisation.

Expert witness: Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.

Witness testimony: Can provide valuable evidence of candidate competence. In line with established principles, witness testimony must be:

- a clear, authentic statement indicating how the learner carries out their job
- dated, signed and include the job title of the witness.

Candidate reports (feedback): Oral or written reports from the candidate which involve descriptions of activities and processes and some self-assessment, e.g. a work diary.

Reflective accounts: A reflective account is usually a write up of how a candidate has carried out part of their job, recording events that actually happened. Where possible, the account should state why the candidate took the actions they did.

Recognition of prior learning (RPL) / achievement (RPA): May be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL / RPA must be authentic, current, valid, relevant and sufficient.

Professional discussion: Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or

video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.

Verbal / written questions: Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge. Questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate.

Projects: An extended piece of practical and / or written work involving planning and research, generally presented as a report.

Assignments: May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.

Case studies: An effective case study report should:

- clearly identify the core problem(s)
- analyse the issues underlying the problem
- discuss and justify alternative solutions using theory / experience
- present feasible recommendations
- be presented in an appropriate format.

Audio / video recordings: May be used to support observation reports, examination of work products and knowledge questionnaires.

Simulation / role play: A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment'².

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit. The most appropriate forms of evidence should be selected for each unit or part of a unit.

Characteristics of assessment guidance

The candidate may produce evidence from a range of examples (as outlined above) which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the candidate's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of a Business and Administration Framework NVQ unit.

The assessor will need to be assured that the learner can:

- consistently perform the job or tasks to the required level of competence
- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit.

All examples of evidence submitted for assessment of a unit must be:

- current
- sufficient
- relevant

² See CfA Assessment Strategy 2009 Business & Administration NOS, December 2009, clause 4.2.

- appropriate
- authentic
- fair.

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the candidate, the assessor and, perhaps, their employer.

Holistic Assessment

The approach to assessing evidence should aim to be holistic; that is, evidence in support of one unit or part of a unit may be used in part for aspects of another unit. Many of the Framework NVQ units from the Business and Administration suite are interrelated and evidence from one unit may equally be applied to part of the evidence requirements of another unit (See Appendix 2).

Using a holistic approach to assessment will:

- enrich the assessment process for the candidate and the assessor by bringing together elements of different units
- make more sense to the candidate and avoid duplication of assessment
- provide a rigorous approach to the assessment process
- allow for evidence for particular units to be drawn from a range of activities, thus making it easier to cover aspects that may not occur in a one-off assessment
- efficiently use assessment opportunities and reduce over-assessment
- be cost effective.

Holistic assessment will minimise repetition, time and the burden of assessment on all parties involved in the assessment process. This should not prevent individual units being signed-off as they are completed.

Using other related qualifications as evidence

Other qualifications can be used as supporting evidence in a candidate's portfolio. The qualification must be current and be benchmarked to one or more of the Business and Administration Framework NVQ units. However, it will only be supporting evidence, as assessors must still make judgments about how the learner demonstrates competence at work.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at:

www.cityandguilds.com/eportfolios.

City & Guilds has also developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

N/SVQ Recording forms are available on the City & Guilds website.

Although it is expected that new centres will use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4.4 Recognition of prior learning/achievement (RPA)

Recognition of Prior Learning/Achievement (RPUA) recognises the contribution a person's previous experience could contribute to a qualification.

RPURPA for Business and Administration units may be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPLI RPA must be authentic, current, valid, relevant and sufficient.

Please refer to the relevant Assessment Strategy for guidance on RPURPA for imported units.

5 Units

Availability of units

The units for these qualifications follow.

Imported units from Customer Service and Management are available in the **4428 Imported Units document** from www.cityandguilds.com.

The learning outcomes and assessment criteria are also viewable on the National Database of Accredited Qualifications (NDAQ) **www.accreditedqualifications.org.uk**

Structure of units

The units in these qualifications are written in a standard format and comprise the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- evidence requirements for business and administration units.

Unit 310

Develop a presentation

Level: 3

Credit value: 3

NDAQ number: M/601/2528

Unit aim

This unit is about developing a presentation.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of preparing for and evaluating a presentation
- 2 Be able to develop a presentation

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA617.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of preparing for and evaluating a presentation**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of using different types of presentation and equipment to provide information
- 1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies
- 1.3 Explain the benefits of preparing for giving a presentation
- 1.4 Explain and illustrate how presentations may be enhanced by materials and equipment
- 1.5 Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation

Outcome 2: Be able to develop a presentation**Assessment Criteria**

The learner can:

- 2.1 Agree and confirm audience, purpose, content, style and timing of a presentation
- 2.2 Research and plan a presentation
- 2.3 Select any equipment needed for the presentation
- 2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience
- 2.5 Obtain feedback on planned presentation and make adjustments, if required
- 2.6 Produce presentation handouts
- 2.7 Collect feedback on the written presentation
- 2.8 Reflect on the feedback obtained of the written presentation and identify learning points
- 2.9 Identify changes that will improve future written presentations

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails •
	2.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
	2.3 – 2.4 2.8 – 2.9	Evidence may be supplied via candidate reports/reflective accounts
	2.5 2.7	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
	2.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •

Unit 311

Deliver a presentation

Level: 3

Credit value: 3

NDAQ number: T/601/2529

Unit aim

This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

Learning outcomes

There are **five** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of preparing for and evaluating a presentation
- 2 Understand the techniques used in enhancing a presentation
- 3 Be able to prepare for delivery of a presentation
- 4 Be able to deliver a presentation
- 5 Be able to evaluate a presentation

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA623.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of preparing for and evaluating a presentation**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of using different types of presentation and equipment
- 1.2 Explain different ways of delivering presentations and their features
- 1.3 Explain the procedures to be followed when preparing a presentation
- 1.4 Explain the benefits of preparing for giving a presentation
- 1.5 Describe the types of problems that may occur with equipment and how to deal with them
- 1.6 Explain the purpose and benefits of contingency planning
- 1.7 Explain the purpose and benefits of collecting feedback from the audience on the presentation
- 1.8 Explain the purpose and benefits of evaluating presentations and own performance

Outcome 2: Understand the techniques used in enhancing a presentation**Assessment Criteria**

The learner can:

- 2.1 Explain and illustrate how presentations may be enhanced by materials and equipment
- 2.2 Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills
- 2.3 Describe how to gauge audience reaction to the presentation
- 2.4 Explain the purpose and benefits of summarising important features of the presentation
- 2.5 Describe the purpose and benefits of giving the audience opportunities to ask questions

Outcome 3: Be able to prepare for delivery of a presentation**Assessment Criteria**

The learner can:

- 3.1 Select any equipment needed and plan how to use it to best effect
- 3.2 Make contingency plans in case of equipment failure or other problems, if required
- 3.3 Practise the presentation and its timing
- 3.4 Obtain feedback on planned presentation and make adjustments, if required

Outcome 4: Be able to deliver a presentation

Assessment Criteria

The learner can:

- 4.1 Check equipment and resources
- 4.2 Circulate presentation materials
- 4.3 Introduce self to audience and state aims of the presentation
- 4.4 Address the audience, speaking clearly and confidently, using language to suit the topic and audience
- 4.5 Vary tone, pace and volume to emphasise key points
- 4.6 Gauge audience reaction during the presentation and adapt if required
- 4.7 Summarise throughout the presentation to emphasise key points and help to maintain audience interest
- 4.8 Use body language in a way that reinforces presented information
- 4.9 Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur
- 4.10 Provide the audience with opportunities to ask questions
- 4.11 Listen carefully to questions and respond in a way that meets the audience's needs

Outcome 5: Be able to evaluate a presentation

Assessment Criteria

The learner can:

- 5.1 Collect feedback on the presentation
- 5.2 Reflect on own performance and identify learning points
- 5.3 Evaluate the presentation and own performance and identify changes that will improve future presentations

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1 – 3.3	
	3.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
4.	4.1	Evidence may be supplied via candidate reports/reflective accounts

4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• presentation materials
4.3 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• presentation notes• handouts• slides
5.	5.1 Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• feedback• evaluation sheets
5.2 – 5.3	Evidence may be supplied via candidate reports/reflective accounts

Unit 316

Support the design and development of an information system

Level: 3

Credit value: 7

NDAQ number: L/601/2536

Unit aim

This unit is about contributing to the design and development of an information system that will meet identified needs in a business environment.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of supporting the design and development of an information system
- 2 Understand how to contribute to the design and development of an information system
- 3 Be able to contribute to the design and development of an information system

Guided learning hours

It is recommended that 35 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD111.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 316

Support the design and development of an information system

Outcome 1: Understand the purpose of supporting the design and development of an information system

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and value of contributing to the design and development of an information system
- 1.2 Describe ways of contributing to the design and development of an information system

Outcome 2: Understand how to contribute to the design and development of an information system

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and value of contributing own user needs for an information system
- 2.2 Explain the benefits of developing a system specification based on user needs
- 2.3 Describe ways of contributing to the creation, design and development of an information system
- 2.4 Explain the purpose and value of contributing to the testing of an information system during design and development

Outcome 3: Be able to contribute to the design and development of an information system

Assessment Criteria

The learner can:

- 3.1 Identify and agree the information to be managed
- 3.2 Contribute to the design and development of an information system to meet agreed specification requirements
- 3.3 Support system testing
- 3.4 Identify and report faults
- 3.5 Remedy faults, within limits of own authority

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1 3.3 – 3.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• notes of meetings
	3.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• specification

Unit 317

Monitor information systems

Level: 3

Credit value: 7

NDAQ number: R/601/2537

Unit aim

This unit is about monitoring and evaluating an information system to meet identified needs in a business environment.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand how to monitor an information system
- 2 Understand how to review and further develop an information system
- 3 Be able to monitor an information system

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD131.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to monitor an information system**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of managing information to meet requirements
- 1.2 Explain the purpose and benefits of providing training and on-going support to users
- 1.3 Explain the purpose of complying with legal and organisational requirements when using an information system
- 1.4 Explain the purpose and benefits of monitoring use of an information system
- 1.5 Describe ways of monitoring use of an information system
- 1.6 Explain the purpose and benefits of maintaining and updating an information system
- 1.7 Describe ways of maintaining and updating an information system
- 1.8 Describe the types of problems that may occur with an information system and how to deal with them

Outcome 2: Understand how to review and further develop an information system**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of continuously improving an information system
- 2.2 Explain how to identify problems in an information system and analyse them
- 2.3 Describe ways of resolving problems in an information system

Outcome 3: Be able to monitor an information system**Assessment Criteria**

The learner can:

- 3.1 Identify the information to be monitored and the resources available to do so
- 3.2 Contribute to designing a system specification
- 3.3 Provide training on the use of an information system
- 3.4 Provide on-going support to users
- 3.5 Monitor use of an information system
- 3.6 Make sure legal and organisational requirements for handling information are followed
- 3.7 Make sure a system is maintained and updated, if required

- 3.8 Identify, analyse and resolve problems when they occur
- 3.9 Collect feedback on performance of an information system
- 3.10 Provide information to enable further system development to meet agreed specifications

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 -3.2 3.4 -3.8	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • training records
	3.9 – 3.10	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • feedback • notes of meetings

Unit 318

Analyse and report data

Level: 3

Credit value: 6

NDAQ number: Y/601/2538

Unit aim

This unit is about analysing and reporting data that meets the aims and objectives of the research.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand how to organise and evaluate data that has been researched
- 2 Understand how to report data that has been researched
- 3 Be able to analyse and evaluate data
- 4 Be able to report data

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD322.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to organise and evaluate data that has been researched**Assessment Criteria**

The learner can:

- 1.1 Describe purpose and benefits of organising data so that it can be analysed
- 1.2 Explain how to evaluate the relevance, validity and reliability of data
- 1.3 Explain how to analyse and prepare researched data so results will be accurate and free from bias
- 1.4 Explain the differences between primary and secondary research methods
- 1.5 Explain the differences between quantitative and qualitative research methods
- 1.6 Describe how to search for relevant data sources

Outcome 2: Understand how to report data that has been researched**Assessment Criteria**

The learner can:

- 2.1 Describe ways of reporting data so that it
 - a meets agreed aims and objectives
 - b is accurate and free from bias

Outcome 3: Be able to analyse and evaluate data**Assessment Criteria**

The learner can:

- 3.1 Organise data so that it can be analysed and reported
- 3.2 Select relevant, valid and reliable data to analyse
- 3.3 Apply analysis and evaluation techniques, as required
- 3.4 Review data to produce accurate, unbiased results and conclusions
- 3.5 Check the accuracy of the analysis, and make adjustments, if required
- 3.6 Obtain feedback on data analysis, if required

Outcome 4: Be able to report data**Assessment Criteria**

The learner can:

- 4.1 Present data in agreed format
- 4.2 Present data to agreed timescale

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1	
3.	3.1 – 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
4.	4.1 – 4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •

Unit 319

Order products and services

Level: 3

Credit value: 5

NDAQ number: D/601/2539

Unit aim

This unit is about the ordering and supply of products and services for an organisation, ensuring that the products and services supplied meet the needs of the organisation and represent the best value for money.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand how to identify, select and negotiate the supply of products and services
- 2 Understand organisational requirements and policies for the ordering and supply of products and services
- 3 Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services
- 4 Be able to follow organisational procedures for the ordering and supply of products and services
- 5 Be able to maintain relationships with suppliers of products and services and deal with problems
- 6 Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services

Guided learning hours

It is recommended that 35 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF131.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to identify, select and negotiate the supply of products and services**Assessment Criteria**

The learner can:

- 1.1 Identify different sources of information on products and services for an organisation
- 1.2 Explain how to use different sources of information on products and services
- 1.3 Describe how to write a specification for a product or service
- 1.4 Identify sources of products and services that meet the quality expectations of an organisation
- 1.5 Explain the purpose of selecting products and services that represent best value for money
- 1.6 Describe how to negotiate best value for money
- 1.7 Explain the purpose of developing and maintaining good relationships with suppliers, and ways of doing so
- 1.8 Describe a supply chain and how it works

Outcome 2: Understand organisational requirements and policies for the ordering and supply of products and services**Assessment Criteria**

The learner can:

- 2.1 Describe the procedures for the ordering and supply of products and services for an organisation
- 2.2 Describe the needs and priorities for the ordering and supply of products and services for an organisation
- 2.3 Explain the purpose of having organisational policies for the acceptance of gifts and hospitality

Outcome 3: Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of monitoring and evaluating procedures for the ordering and supply of products and services, and ways of doing so
- 3.2 Describe actions that may be taken to improve efficiency in the ordering and supply of products and services
- 3.3 Describe ways of getting better value for money for products and services provided

Outcome 4: Be able to follow organisational procedures for the ordering and supply of products and services

Assessment Criteria

The learner can:

- 4.1 Use available information to keep up to date with products and services in own area of work
- 4.2 Agree a budget and specification for products or services to be ordered
- 4.3 Identify sources of products and services that meet the quality specification(s) of the organisation
- 4.4 Select the product or service which represents best value for money
- 4.5 Procure product(s) or service(s) following organisational procedures
- 4.6 Negotiate with selected supplier(s) to reach an agreement which offers good value for money and which is acceptable to both parties, within limits of own authority
- 4.7 Agree a contract for the supply of product(s) or service(s), within limits of own authority

Outcome 5: Be able to maintain relationships with suppliers of products and services and deal with problems

Assessment Criteria

The learner can:

- 5.1 Take actions to create and maintain partnerships with suppliers to improve quality and cut costs, within limits of own authority
- 5.2 Monitor the performance of suppliers in line with the terms of the contract
- 5.3 Deal with problems as they occur, seeking support from others, where necessary

Outcome 6: Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services

Assessment Criteria

The learner can:

- 6.1 Monitor the ordering and supply of products and services for effectiveness and efficiency
- 6.2 Evaluate the ordering and supply of products and services and identify areas for improvement
- 6.3 Suggest ways to improve effectiveness and efficiency and obtain better value for money for the supply of products and services

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.3	
3.	3.1 - 3.3	

4.	4.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner 's job role from the following sources:
	4.3 - 4.4	<ul style="list-style-type: none"> • information used
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • budgets
	4.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • orders • delivery notes
	4.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • letters • emails • memos
	4.7	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • contract
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and professional discussion
	5.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • records of monitoring
	5.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • letters • emails • memos
6.	6.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
		<ul style="list-style-type: none"> • records of monitoring
	6.2	Evidence may be supplied via candidate reports/reflective accounts and professional discussion

6.3

Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- appraisals
- performance review

Unit 320

Plan and organise an event

Level: 3

Credit value: 4

NDAQ number: R/601/2540

Unit aim

This unit is about planning and organising an event.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand the role of an event organiser in planning an event
- 2 Understand the arrangements to be made when planning and organising an event
- 3 Understand the different types of venues and resources needed for different types of events
- 4 Be able to plan and organise an event

Guided learning hours

It is recommended that 28 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA312.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the role of an event organiser in planning an event**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of planning an event
- 1.2 Explain the role of the event organiser in:
 - a) meeting the objectives of the event
 - b) agreeing a brief and budget for the event
- 1.3 Identify and evaluate the types of risks associated with events and explain how to minimise these
- 1.4 Explain the purpose and benefits of a contingency plan for an event
- 1.5 Describe the types of problems that may occur when organising an event and how to solve them
- 1.6 Categorise different types of events and their main features

Outcome 2: Understand the arrangements to be made when planning and organising an event**Assessment Criteria**

The learner can:

- 2.1 Explain the role of the event organiser for
 - a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements
 - b) meeting relevant health, safety and security arrangements
 - c) meeting legal and organisational requirements for contracts
 - d) organising resources and the production of event materials
 - e) the types of activities and resources that may be needed during an event
 - f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood

Outcome 3: Understand the different types of venues and resources needed for different types of events**Assessment Criteria**

The learner can:

- 3.1 Identify and evaluate different types of venue in terms of suitability for events and costs
- 3.2 Describe a range of resources that may be needed for events and illustrate how they may be used

- 3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event

Outcome 4: Be able to plan and organise an event

Assessment Criteria

The learner can:

- 4.1 Agree an event brief and budget
- 4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies
- 4.3 Identify and agree resources and support needed for organising an event
- 4.4 Agree requirements for venue(s)
- 4.5 Identify venue and agree costings
- 4.6 Liaise with the venue to confirm event requirements and / or any special delegate requirements
- 4.7 Agree requirements for resources
- 4.8 Co-ordinate resources and production of event materials
- 4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements
- 4.10 Make sure legal and organisational requirements for contracts are met
- 4.11 Make sure that all those involved are briefed and trained to fulfil their roles
- 4.12 Delegate functions to the event team as required
- 4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required
- 4.14 Make sure invitations are sent out to delegates
- 4.15 Manage delegate responses
- 4.16 Prepare joining instructions and event materials to be sent to delegates

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1	
3.	3.1 – 3.3	
4.	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • briefs •

4.2 Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- plans

4.3 – 4.16 Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- event packs
- training schedules

Unit 321

Co-ordinate an event

Level: 3

Credit value: 4

NDAQ number: Y/601/2541

Unit aim

This unit is about co-ordinating the delivery of an event.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief
- 2 Understand the activities required when co-ordinating an event
- 3 Be able to co-ordinate an event

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA312.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief**Assessment Criteria**

The learner can:

- 1.1 Explain the responsibilities of an event co-ordinator
- 1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief

Outcome 2: Understand the activities required when co-ordinating an event**Assessment Criteria**

The learner can:

- 2.1 Explain the role of the event co-ordinator during the event for:
 - a) all delegate provision and needs,
 - b) meeting relevant health, safety and security requirements
 - c) observing legal and organisational requirements for contracts
 - d) co-ordinating resources and the use of event materials
 - e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out
 - f) resolving problems
 - g) overseeing the work of key staff
- 2.2 Explain the role of an event co-ordinator after an event for:
 - a) clearing and vacating the venue
 - b) organising follow up papers and activities, if required
 - c) reconciling accounts to budget
 - d) evaluating an event and the methods that can be used to do this

Outcome 3: Be able to co-ordinate an event**Assessment Criteria**

The learner can:

- 3.1 Prepare the venue and make sure all necessary resources are in place
- 3.2 Co-ordinate activities during an event, in line with agreed plans
- 3.3 Help delegates to feel welcome
- 3.4 Respond to delegates' needs throughout an event
- 3.5 Resolve problems, as required
- 3.6 Oversee the work of key staff during the event

- 3.7 Monitor compliance with relevant health, safety and security requirements
- 3.8 Liaise with the management of the venue to make sure facility resources are in place
- 3.9 Arrange clearing, and vacating the venue according to the terms of the contract
- 3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required
- 3.11 Reconcile accounts to budget, if required
- 3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant
- 3.13 Agree key learning points and use these to improve the running of future events

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.2	
3.	3.1 – 3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role.
	3.8 – 3.10 3.12 – 3.13	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • event records
	3.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • budget •

Unit 322

Plan and organise meetings

Level: 3

Credit value: 5

NDAQ number: D/601/2542

Unit aim

This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand the arrangements and actions required for planning and organising meetings
- 2 Be able to prepare for a meeting
- 3 Be able to support running a meeting
- 4 How to follow up a meeting

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA412.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the arrangements and actions required for planning and organising meetings**Assessment Criteria**

The learner can:

- 1.1 Explain the role of the person planning and organising a meeting
- 1.2 Describe the different types of meetings and their main features
- 1.3 Explain how to plan meetings that meet agreed aims and objectives
- 1.4 Explain the purpose of agreeing a brief for the meeting
- 1.5 Explain how to identify suitable venues for different types of meetings
- 1.6 Describe the types of resources needed for different types of meetings
- 1.7 Outline the main points that should be covered by an agenda and meeting papers
- 1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings
- 1.9 Describe the health, safety and security requirements that need to be considered when organising meetings
- 1.10 Explain the purpose and benefits of briefing the chair before a meeting
- 1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required
- 1.12 Describe the types of information, advice and support that may be need to be provided during a meeting
- 1.13 Describe the types of problems that may occur during a meeting and how to solve them
- 1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved
- 1.15 Explain how to record actions and follow up, if required
- 1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting
- 1.17 Describe how to agree learning points to improve the organisation of future meetings

Outcome 2: Be able to prepare for a meeting**Assessment Criteria**

The learner can:

- 2.1 Agree and prepare the meeting brief, checking with others, if required
- 2.2 Agree a budget for the meeting, if required
- 2.3 Prepare and agree an agenda and meeting papers
- 2.4 Organise and confirm venue, equipment and catering requirements, when necessary
- 2.5 Invite attendees, confirm attendance and identify any special requirements
- 2.6 Arrange catering, if required

- 2.7 Arrange the equipment and layout of the room, if required
- 2.8 Make sure the chair receives appropriate briefing

Outcome 3: Be able to support running a meeting

Assessment Criteria

The learner can:

- 3.1 Welcome attendees and offer suitable refreshments (if required)
- 3.2 Make sure attendees have full set of papers
- 3.3 Make sure a person has been nominated to take minutes, if required
- 3.4 Provide information, advice and support when required

Outcome 4: How to follow up a meeting

Assessment Criteria

The learner can:

- 4.1 Produce a record of the meeting
- 4.2 Seek approval for the meeting record, amend as required
- 4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record
- 4.4 Follow up action points, if required
- 4.5 Evaluate meeting arrangements, and external services where used
- 4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used
- 4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.17	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 2.4 – 2.6 2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails •

2.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • budget
2.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • agenda • meeting papers
3.2.1	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role</p>
3.2 – 3.4	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • meeting papers
–	<p>learner's job role from the following sources:</p> <ul style="list-style-type: none"> • records
4.3 – 4.4	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos
4.5 – 4.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • evaluations

Unit 323

Organise business travel or accommodation

Level: 3

Credit value: 5

NDAQ number: H/601/2543

Unit aim

This unit is about organising the delivery of travel or accommodation arrangements to meet the travellers brief within budget.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand the range of information, requirements and procedures that may be needed for all types of business travel or accommodation arrangements
- 2 Understand the types of problems that may occur with business travel or accommodation arrangements and how to deal with them
- 3 Be able to organise different types of business travel or accommodation arrangements

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA322.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the range of information, requirements and procedures that may be needed for all types of business travel or accommodation arrangements**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of agreeing the brief and budget of travel or accommodation arrangements with traveller(s)
- 1.2 Explain how to organise business travel or accommodation to meet expectations
- 1.3 The sources of information and facilities that are used to make travel or accommodation arrangements
- 1.4 Describe the main types of business travel or accommodation arrangements that can be made, including those requiring additional specialist documents and facilities
- 1.5 How to obtain best value for money when making travel or accommodation arrangements
- 1.6 Explain procedures for obtaining specific information, facilities or documents for
 - a payment facilities and foreign currency, if required
 - b insurance and health precautions, if required
 - c visas, and passport requirements, if required
 - d security and emergencies, if required
- 1.7 How to keep records of travel or accommodation arrangements, including financial records
- 1.8 The types of information that are confidential and how to store them in line with current legislation

Outcome 2: Understand the types of problems that may occur with business travel or accommodation arrangements and how to deal with them**Assessment Criteria**

The learner can:

- 2.1 Describe problems that may occur when making arrangements for business travel or accommodation
- 2.2 Explain ways of resolving problems that may arise

Outcome 3: Be able to organise different types of business travel or accommodation arrangements**Assessment Criteria**

The learner can:

- 3.1 Agree the business travel or accommodation brief and budget with traveller(s)
- 3.2 Check draft itinerary and schedule with a traveller(s)

- 3.3 Research suitable business travel or accommodation options
- 3.4 Make business travel arrangements or book accommodation, to brief and budget, obtaining best value for money
- 3.5 Make necessary payments or arrange payment facilities
- 3.6 Make additional arrangements for international travel and accommodation, if required
- 3.7 Obtain confirmations and record all details of arrangements
- 3.8 Collate all documents and other items
- 3.9 Keep business travel items (if required) safe and secure until handed over
- 3.10 Provide traveller(s) with itinerary and all required information and documents, in good time
- 3.11 Confirm with traveller(s) that all items provided meet requirements
- 3.12 Resolve problems that may arise

Evidence requirements

LEARNING	ASSESSMENT	ASSESSMENT GUIDANCE
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 - 2.2	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • briefs •
	3.2 – 3.8 3.10 – 3.12	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •
	3.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •

Unit 324

Evaluate the organisation of business travel or accommodation

Level: 3

Credit value: 2

NDAQ number: K/601/2544

Unit aim

This unit is about evaluating the effectiveness of processes, services, etc involved in the delivery of business travel or accommodation arrangements.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and processes of evaluating business travel or accommodation arrangements
- 2 Be able to evaluate business travel or accommodation arrangements

Guided learning hours

It is recommended that 10 hours should be allocated for this unit, although patterns of delivery are likely to vary.

10

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA322.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and processes of evaluating business travel or accommodation arrangements

Assessment Criteria

The learner can:

- 1.1 Describe different criteria that may be used to evaluate arrangements for business travel or accommodation
- 1.2 Explain the benefits of evaluating business travel or accommodation arrangements for individuals and organisations

Outcome 2: Be able to evaluate business travel or accommodation arrangements

Assessment Criteria

The learner can:

- 2.1 Use records of business travel and accommodation arrangements made and services used and assess their effectiveness
- 2.2 Use feedback from a traveller(s) to assess the effectiveness of business travel and accommodation arrangements made and services used
- 2.3 Record outcomes of evaluations to inform future service expectations
- 2.4 Make recommendations to the appropriate people to update business travel or accommodation policies and procedures

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • records • questionnaires

2.2 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- feedback received
- questionnaires

2.3 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- records

2.4 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- reports

Unit 327

Contribute to running a project

Level: 3

Credit value: 5

NDAQ number: J/601/2549

Unit aim

This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand how to contribute to agree to a project brief
- 2 Understand how to contribute to a project
- 3 Understand the purpose of contributing to the evaluation of a project
- 4 Be able to contribute to preparing and planning a project
- 5 Be able to contribute to running a project
- 6 Be able to contribute to evaluating the outcomes of a project

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA151.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to contribute to agree to a project brief**Assessment Criteria**

The learner can:

- 1.1 Describe the difference between routine work and taking part in a project
- 1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate
- 1.3 Explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control
- 1.4 Explain the purpose and benefits of identifying stakeholders involved in the project
- 1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives
- 1.6 Explain the purpose of agreeing a budget for a project
- 1.7 Describe how to estimate types and quantity of resources needed to run a project
- 1.8 Describe how to identify project risks and develop contingency plans, if required

Outcome 2: Understand how to contribute to a project**Assessment Criteria**

The learner can:

- 2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information
- 2.2 Describe how to estimate and control resources in an area of work during a project
- 2.3 Explain the purpose of reporting own progress during a project
- 2.4 Outline reasons for seeking advice in response to unexpected events
- 2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales
- 2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work
- 2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly

Outcome 3: Understand the purpose of contributing to the evaluation of a project

Assessment Criteria

The learner can:

- 3.1 Describe different types of methods available to monitor projects
- 3.2 Explain the purpose of making own contributions when evaluating projects
- 3.3 Describe how to learn lessons for the future for own work

Outcome 4: Be able to contribute to preparing and planning a project

Assessment Criteria

The learner can:

- 4.1 Confirm the purpose of the project with all stakeholders
- 4.2 Confirm project scope, timescale, aims and objectives
- 4.3 Contribute to the preparation of a project specification
- 4.4 Confirm all types of resources for all stakeholders
- 4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work
- 4.6 Contribute to identifying risks and develop contingency plans for an area of work

Outcome 5: Be able to contribute to running a project

Assessment Criteria

The learner can:

- 5.1 Implement a project
- 5.2 Communicate with all stakeholders involved with or affected by a project
- 5.3 Adapt project plans for stakeholders to respond to unexpected events and risks
- 5.4 Provide interim reports on project progress to relevant stakeholders
- 5.5 Achieve required outcomes for relevant stakeholders on time and to budget
- 5.6 Seek advice in response to unexpected events, if required
- 5.7 Keep records of project activity

Outcome 6: Be able to contribute to evaluating the outcomes of a project

Assessment Criteria

The learner can:

- 6.1 Evaluate project for all stakeholders
- 6.2 Report on the degree to which a project met its aims and objectives for all stakeholders
- 6.3 Report on project strengths and areas for improvement for all stakeholders

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 - 2.7	
3.	3.1 – 3.3	
4.	4.1 – 4.2 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •
	4.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • Critical path analysis •
	4.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • risks identified •

5.	5.1 5.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	5.2 5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings
	5.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • adapted plans
	5.4 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports
		<p>learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings
	6.2 – 6.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports

Unit 328

Deliver, monitor and evaluate customer service to internal customers

Level: 3

Credit value: 3

NDAQ number: A/601/2550

Unit aim

This unit is about providing and continuously improving services to internal customers.

Learning outcomes

There are **ten** learning outcomes to this unit.

The learner will:

- 1 Understand the meaning of internal customer
- 2 Know the types of products and services relevant to internal customers
- 3 Understand how to deliver customer service that meets or exceeds internal customer expectations
- 4 Understand the purpose of quality standards and timescales for delivering customer service
- 5 Understand how to deal with internal customer service problems
- 6 Understand how to monitor and evaluate internal customer service and the benefits of this
- 7 Be able to build positive working relationships with internal customers
- 8 Be able to deliver customer services to agreed quality standards and timescales
- 9 Be able to deal with internal customer service problems and complaints
- 10 Be able to monitor and evaluate customer services to internal customers

Guided learning hours

It is recommended that 12 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAC121.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 328

Deliver, monitor and evaluate customer service to internal customers

Outcome 1: Understand the meaning of internal customer

Assessment Criteria

The learner can:

- 1.1 Describe what is meant by internal customers

Outcome 2: Know the types of products and services relevant to internal customers

Assessment Criteria

The learner can:

- 2.1 Describe the products and services offered by own organisation to internal customers

Outcome 3: Understand how to deliver customer service that meets or exceeds internal customer expectations

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and value of identifying internal customer needs and expectations
- 3.2 Explain why customer service must meet or exceed internal customer expectations
- 3.3 Explain the value of meeting or exceeding internal customer expectations
- 3.4 Explain the purpose and value of building positive working relationships

Outcome 4: Understand the purpose of quality standards and timescales for delivering customer service

Assessment Criteria

The learner can:

- 4.1 Identify quality standards for own organisation and work
- 4.2 Explain the value of agreeing quality standards and timescales
- 4.3 Explain how to set and meet quality standards and timescales with internal customers

Outcome 5: Understand how to deal with internal customer service problems

Assessment Criteria

The learner can:

- 5.1 Describe the types of problems that internal customers may have
- 5.2 Explain ways of dealing with problems
- 5.3 Explain the purpose and value of a complaints procedure, if applicable

Outcome 6: Understand how to monitor and evaluate internal customer service and the benefits of this

Assessment Criteria

The learner can:

- 6.1 Explain the purpose and benefits of monitoring internal customer satisfaction and how to do so
- 6.2 Describe techniques for collecting and evaluating customer feedback
- 6.3 Explain the benefits of continuous improvement

Outcome 7: Be able to build positive working relationships with internal customers

Assessment Criteria

The learner can:

- 7.1 Identify internal customers
- 7.2 Confirm internal customer needs in terms of products and services
- 7.3 Confirm internal customer needs in terms of quality standards and timescales
- 7.4 Agree procedures to be followed if internal customer needs are not met

Outcome 8: Be able to deliver customer services to agreed quality standards and timescales

Assessment Criteria

The learner can:

- 8.1 Provide customer service(s) to agreed quality standards
- 8.2 Provide customer service(s) to agreed timescales
- 8.3 Check internal customer needs and expectations have been met

Outcome 9: Be able to deal with internal customer service problems and complaints

Assessment Criteria

The learner can:

- 9.1 Follow procedures, within agreed timescale, to
 - a process problems and complaints

- b resolve problems and complaints
- c refer problems and complaints, where necessary

Outcome 10: Be able to monitor and evaluate customer services to internal customers

Assessment Criteria

The learner can:

- 10.1 Obtain and record internal customer feedback
- 10.2 Analyse and evaluate internal customer feedback
- 10.3 Take action that will lead to improvement in customer service(s) to internal customers

Evidence requirements

Learning	Assessment	Assessment Guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1	
3.	3.1 – 3.4	
4.	4.1 – 4.3	
5.	5.1 – 5.3	
6.	6.1 – 6.3	
7.	7.1	Evidence may be supplied via observation of workplace activities, witness testimony, candidate reports/reflective accounts
	7.2-7.4	
8.	8.1 – 8.3	Evidence may be supplied via observation of workplace activities witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails •
9.	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies, candidate reports/reflective accounts
10.	10.1 – 10.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •

Unit 329

Deliver, monitor and evaluate customer service to external customers

Level: 3

Credit value: 3

NDAQ number: F/601/2551

Unit aim

This unit is about providing and continuously improving customer services to external customers.

Learning outcomes

There are **ten** learning outcomes to this unit.

The learner will:

- 1 Understand the meaning of external customers
- 2 Know the types of products and services relevant to external customers
- 3 Understand how to deliver customer service that meets or exceeds external customer expectations
- 4 Understand the purpose of quality standards and timescales for customer service to external customers
- 5 Understand how to deal with customer service problems for external customers
- 6 Understand how to monitor and evaluate external customer service and the benefits of this
- 7 Be able to build positive working relationships with external customers
- 8 Be able to deliver external customer services to agreed quality standards and timescales
- 9 Be able to deal with customer service problems and complaints for external customers
- 10 Be able to monitor and evaluate services to external customers

Guided learning hours

It is recommended that 12 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAC122.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 329

Deliver, monitor and evaluate customer service to external customers

Outcome 1: Understand the meaning of external customers

Assessment Criteria

The learner can:

- 1.1 Describe what is meant by external customers

Outcome 2: Know the types of products and services relevant to external customers

Assessment Criteria

The learner can:

- 2.1 Describe the products and services offered by the organisation to external customers

Outcome 3: Understand how to deliver customer service that meets or exceeds external customer expectations

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and value of identifying customer needs and expectations
- 3.2 Explain why customer service must meet or exceed customer expectations
- 3.3 Explain the value of meeting or exceeding customer expectations
- 3.4 Explain the purpose and value of building positive working relationships

Outcome 4: Understand the purpose of quality standards and timescales for customer service to external customers

Assessment Criteria

The learner can:

- 4.1 Identify quality standards for own organisation and work
- 4.2 Explain the value of agreeing quality standards and timescales
- 4.3 Explain how to set and meet quality standards and timescales with external customers

Outcome 5: Understand how to deal with customer service problems for external customers

Assessment Criteria

The learner can:

- 5.1 Describe the types of problems that external customers may have
- 5.2 Explain the consequences of not meeting external customer needs and expectations
- 5.3 Explain ways of dealing with external customer services problems
- 5.4 Explain the purpose and value of a complaints procedure

Outcome 6: Understand how to monitor and evaluate external customer service and the benefits of this

Assessment Criteria

The learner can:

- 6.1 Explain the purpose and benefits of monitoring external customer satisfaction and how to do so
- 6.2 Describe techniques for collecting and evaluating external customer feedback
- 6.3 Explain the benefits of continuous improvement

Outcome 7: Be able to build positive working relationships with external customers

Assessment Criteria

The learner can:

- 7.1 Identify external customers
- 7.2 Confirm external customer needs in terms of products and services
- 7.3 Confirm external customer needs in terms of quality standards and timescales
- 7.4 Agree procedures to be followed if external customer needs are not met

Outcome 8: Be able to deliver external customer services to agreed quality standards and timescales

Assessment Criteria

The learner can:

- 8.1 Provide external customer service(s) to agreed quality standards
- 8.2 Provide external customer service(s) to agreed timescales
- 8.3 Check external customer needs and expectations have been met

Outcome 9: Be able to deal with customer service problems and complaints for external customers

Assessment Criteria

The learner can:

- 9.1 Follow procedures, within agreed timescale, to

- a process problems and complaints
- b resolve problems and complaints
- c refer problems and complaints, where necessary

Outcome 10: Be able to monitor and evaluate services to external customers

Assessment Criteria

The learner can:

- 10.1 Obtain and record external customer feedback
- 10.2 Analyse and evaluate external customer feedback
- 10.3 Take actions that will lead to improvement in service(s) to external customers

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1	
3.	3.1 – 3.4	
4.	4.1 – 4.3	
5.	5.1 – 5.4	
6.	6.1 – 6.3	
7.	7.1	Evidence may be supplied via observation of workplace activities, witness testimony, candidate reports/reflective accounts
	7.2 - 7.4	Evidence may be supplied via observation of workplace activities witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
8.	8.1 – 8.3	
		<ul style="list-style-type: none"> • letters • emails • memos
9.	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies, candidate reports/reflective accounts
10.	10.1 – 10.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •

Unit 330

Agree a budget

Level: 3

Credit value: 4

NDAQ number: J/601/2552

Unit aim

This unit is about developing and agreeing a budget for a department or section within a business.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Understand how to develop budgets
- 2 Be able to agree a budget

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA531.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to develop budgets

Assessment Criteria

The learner can:

- 1.1 Explain how to use estimations when developing a draft budget
- 1.2 Explain how to identify priorities and financial resources needed when preparing a budget
- 1.3 Explain the purpose and benefits of identifying priorities when preparing a budget
- 1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income
- 1.5 Describe procedures for negotiating superseded budgets
- 1.6 Describe skills needed for agreeing budgets

Outcome 2: Be able to agree a budget

Assessment Criteria

The learner can:

- 2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget
- 2.2 Evaluate and justify costs and risks
- 2.3 Prepare a draft budget
- 2.4 Negotiate and agree a budget

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 - 2.2	Evidence may be supplied via candidate reports/reflective accounts
	2.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner’s job role from the following sources: •
	2.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: •

Unit 401

Manage and be accountable for own performance in a business environment

Level: 4

Credit value: 3

NDAQ number: L/601/2553

Unit aim

This unit is about taking responsibility for managing, prioritising and being accountable for your own work in a business environment alongside other people.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand how to work effectively and be accountable for own work
- 2 Understand how to behave in a way that supports effective working
- 3 Be able to plan, negotiate and be accountable for own work
- 4 Behave in a way that supports effective working

Guided learning hours

It is recommended that 18 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA627.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 401

Manage and be accountable for own performance in a business environment

Outcome 1: Understand how to work effectively and be accountable for own work

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of negotiating realistic targets and resources for work and ways of doing so
- 1.2 Analyse different ways of working effectively, and the purpose and benefits of using effective working methods
- 1.3 Explain the purpose and benefits for yourself and organisations of recognising and learning from mistakes
- 1.4 Evaluate organisational guidelines, procedures and codes of practice for their relevance to own work

Outcome 2: Understand how to behave in a way that supports effective working

Assessment Criteria

The learner can:

- 2.1 Evaluate the purpose and benefits of setting high standards for own work
- 2.2 Evaluate ways of setting high standards for work
- 2.3 Compare and contrast ways of dealing with pressure arising from work tasks
- 2.4 Explain the purpose and benefits of accepting setbacks and dealing with them
- 2.5 Explain the purpose and benefits of being assertive and its meaning in work tasks
- 2.6 Give examples of work situations where it is necessary to be assertive
- 2.7 Evaluate the purpose and benefits of being ready to take on new challenges and adapt to change
- 2.8 Evaluate the purpose and benefits of treating others with honesty, respect and consideration
- 2.9 Analyse the effects of different types of behaviour at work that show honesty, respect and consideration and those that do not
- 2.10 Describe how to recognise when others need support
- 2.11 Evaluate different ways of helping and supporting others in work tasks
- 2.12 Explain the purpose of helping and supporting others at work, and the value and benefits of doing so
- 2.13 Evaluate the reasons for seeking out new challenges
- 2.14 Analyse the effects of change on an organisation
- 2.15 Explain why and how others should be supported during a period of change

Outcome 3: Be able to plan, negotiate and be accountable for own work

Assessment Criteria

The learner can:

- 3.1 Negotiate, agree and sign-off realistic targets for own work
- 3.2 Negotiate and agree resources needed for own work
- 3.3 Select effective working methods to complete work tasks
- 3.4 Anticipate and deal with problems occurring in own work, referring if required
- 3.5 Meet deadlines or re-negotiate timescales and plans in good time
- 3.6 Take responsibility for own work and accept responsibility for any mistakes made
- 3.7 Evaluate results of mistakes made and make changes to work and methods, as required
- 3.8 Follow agreed work guidelines, procedures and, where needed, codes of practice

Outcome 4: Behave in a way that supports effective working

Assessment Criteria

The learner can:

- 4.1 Set high standards for own work and show drive and commitment in achieving these standards
- 4.2 Adapt work and working methods to deal with pressure, setbacks and difficulties
- 4.3 Assert own needs and rights when necessary to achieve work tasks and priorities
- 4.4 Look for opportunities, and agree to take on new challenges
- 4.5 Look for opportunities, and change ways of working, to meet new requirements
- 4.6 Support others during change
- 4.7 Treat other people with honesty, respect and consideration
- 4.8 Help and support other people in work tasks

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 - 1.4	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.15	
3.	3.1 - 3.2 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports

	3.3 3.6 - 3.7	Evidence may be supplied via witness testimony and candidate reports/reflective accounts.
	3.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports
	3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
4.	4.1 - 4.3 4.5 - 4.8	Evidence may be supplied via witness testimony, professional discussion and candidate reports/reflective accounts
	4.4	Evidence may be supplied via Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts, case studies and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • appraisals • performance reviews • self evaluation

Unit 402

Evaluate and improve own performance in a business environment

Level: 4

Credit value: 4

NDAQ number: R/601/2554

Unit aim

This unit is about taking responsibility for evaluating your own performance in work tasks, then taking responsibility for making and evaluating changes that make sure you will be able to work effectively and efficiently in a business environment alongside other people.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand how to evaluate and improve own performance
- 2 Be able to evaluate and improve own performance using feedback from others
- 3 Be able to use evaluation and feedback to develop and use a learning plan

Guided learning hours

It is recommended that 14 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA627.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to evaluate and improve own performance**Assessment Criteria**

The learner can:

- 1.1 Analyse the purpose and benefits of continuously improving work
- 1.2 Evaluate the purpose and benefits of encouraging and accepting feedback from others
- 1.3 Analyse ways of evaluating own work
- 1.4 Evaluate the purpose and benefits of trying out possible improvements to own work
- 1.5 Analyse how learning and development can improve own work, benefit organisations, and further own career
- 1.6 Evaluate possible career progression routes and the opportunities they offer
- 1.7 Analyse possible development opportunities and the benefits they offer
- 1.8 Evaluate the advantages and disadvantages of a learning plan

Outcome 2: Be able to evaluate and improve own performance using feedback from others**Assessment Criteria**

The learner can:

- 2.1 Encourage and accept feedback from other people
- 2.2 Make recommendations to improve work performance
- 2.3 Complete work tasks, consistently using recommended new ways of working
- 2.4 Evaluate work completed for improvements and effectiveness
- 2.5 Evaluate changes made for improvements and effectiveness

Outcome 3: Be able to use evaluation and feedback to develop and use a learning plan**Assessment Criteria**

The learner can:

- 3.1 Evaluate own performance, using feedback from others, and identify where further learning and development will improve own work
- 3.2 Make recommendations and develop a learning plan to improve own work performance, that meets own needs
- 3.3 Implement a learning plan for improvement to own work
- 3.4 Review and evaluate progress against learning plan and make updates for improving own work and further learning

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews
	2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews • letters • memos • emails • reports
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • completed tasks
	2.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • completed tasks
	2.5	Evidence may be supplied via candidate reports/reflective accounts
3.	3.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews
	3.2 - 3.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •

Unit 403

Support the purpose and values of an organisation

Level: 4

Credit value: 3

NDAQ number: Y/601/2555

Unit aim

This unit is about taking a leading role in establishing and maintaining work environment within own area of responsibility, in ways that consistently show respect and support for other people and which support the mission, purpose and values of an organisation as a whole.

Learning outcomes

There are **seven** learning outcomes to this unit.

The learner will:

- 1 Understand the place of organisations within sectors
- 2 Understand how to work in ways that support organisational purposes and values
- 3 Understand the purpose and benefits of respecting, helping and supporting other people at work
- 4 Understand how to maintain security and confidentiality at work and deal with concerns
- 5 Be able to support the purpose and values of an organisation
- 6 Be able to help, respect and support other people at work in an organisation
- 7 Be able to maintain security and confidentiality in an organisation

Guided learning hours

It is recommended that 14 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF174.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 403

Support the purpose and values of an organisation

Outcome 1: Understand the place of organisations within sectors

Assessment Criteria

The learner can:

- 1.1 Describe the main characteristics of the sector in which an organisation operates
- 1.2 Evaluate the main characteristics of an organisation
- 1.3 Evaluate how organisations compare with one another in own sector of work
- 1.4 Analyse why organisations have a mission and purpose

Outcome 2: Understand how to work in ways that support organisational purposes and values

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of working in ways that support the purposes and values of an organisation
- 2.2 Evaluate the purpose and values of own organisation
- 2.3 Analyse responsibilities for work in own area of responsibility
- 2.4 Explain how responsibilities and work roles in own area of responsibility fit the structure of an organisation
- 2.5 Analyse how responsibilities and work roles in own area of responsibility contribute to the operation of an organisation
- 2.6 Evaluate the policies, procedures, systems and values of own organisation that are relevant to own area of responsibility
- 2.7 Evaluate how responsibilities and job roles in own area of responsibility can support the values and policies of the organisation
- 2.8 Analyse how responsibilities and job roles in own area of responsibility can be used to contribute to developing policies, objectives, systems and values of own organisation

Outcome 3: Understand the purpose and benefits of respecting, helping and supporting other people at work

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and benefits of helping to develop and support other people at work
- 3.2 Explain the purpose and benefits of helping other people to work effectively and efficiently
- 3.3 Explain how helping to develop and support other people can benefit an organisation in the medium and long term

- 3.4 Evaluate different procedures that can be put in place to make sure other people are developed and supported in their current job role and for future new responsibilities
- 3.5 Explain what is meant by diversity and why it should be valued
- 3.6 Evaluate the advantages of diversity to an organisation
- 3.7 Evaluate ways in which a working environment can be developed to support diversity and make the best use of everyone's backgrounds and abilities
- 3.8 Analyse how to treat other people in a way that is sensitive to their needs
- 3.9 Explain how to treat other people in a way that respects their abilities, background, values, customs and beliefs
- 3.10 Explain ways in the rights of others can be supported and maintained
- 3.11 Evaluate ways in which it is possible to learn from others at work and the benefits of doing so

Outcome 4: Understand how to maintain security and confidentiality at work and deal with concerns

Assessment Criteria

The learner can:

- 4.1 Explain the purpose and benefits of maintaining security and confidentiality at work
- 4.2 Analyse the requirements for security and confidentiality in an organisation
- 4.3 Explain legal requirements for security and confidentiality and their impact on an organisation
- 4.4 Analyse procedures for dealing with concerns about security and confidentiality in an organisation and their purpose

Outcome 5: Be able to support the purpose and values of an organisation

Assessment Criteria

The learner can:

- 5.1 Make sure that work supports an organisation's overall mission and values in own area of responsibility
- 5.2 Make sure that work is completed in a way that supports team objectives in own area of responsibility
- 5.3 Make sure that work supports an organisation's policies, systems and procedures in own area of responsibility
- 5.4 Make sure that work with outside organisations and individuals is completed in a way that protects and improves image of own organisation
- 5.5 Make suggestions to improve systems and procedures, and support objectives, policies and values in a way that is consistent with own job role and area of responsibility

Outcome 6: Be able to help, respect and support other people at work in an organisation

Assessment Criteria

The learner can:

- 6.1 Agree and maintain a working environment that values diversity and makes best use of the abilities of everyone, in own area of responsibility
- 6.2 Work with other people in a way that is sensitive to their individual needs, and which respects their background, abilities, values, customs and beliefs, in own area of responsibility
- 6.3 Make sure the rights of other people are supported and maintained in own area of responsibility
- 6.4 Agree and maintain a working environment where feedback from other people with different backgrounds and abilities is used to develop and improve ways of working in own area of responsibility
- 6.5 Make sure organisational procedures and legal requirements in relation to discrimination legislation are followed in own area of responsibility

Outcome 7: Be able to maintain security and confidentiality in an organisation

Assessment Criteria

The learner can:

- 7.1 Maintain the security of property in a way that is consistent with organisational procedures and legal requirements
- 7.2 Maintain the confidentiality of information in a way that is consistent with organisational procedures and legal requirements
- 7.3 Deal with any concerns about the security of property and confidentiality of information

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.8	
3.	3.1 – 3.11	
4.	4.1 – 4.4	
5.	5.1 - 5.4	Evidence may be supplied via witness testimony and candidate reports/reflective accounts

	5.5	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports
6.	6.1 - 6.3 6.5	<p>Evidence may be supplied via witness testimony, case studies and candidate reports/reflective accounts</p>
	6.4	<p>Evidence may be supplied via witness testimony, professional discussion, case studies, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports
7.	7.1 - 7.2	<p>Evidence may be supplied via witness testimony and candidate reports/reflective accounts</p>
	7.3	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports

Unit 404

Support sustainability in a business environment

Level: 4

Credit value: 3

NDAQ number: D/601/2556

Unit aim

This unit is about taking a leading role in supporting the minimisation of waste and the maximisation of efficiency within own area of responsibility in a business environment.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow
- 2 Understand procedures for disposal of hazardous materials
- 3 Understand ways of supporting and maintaining sustainability in an organisation
- 4 Be able to support the minimisation of waste in an organisation
- 5 Be able to support the maintenance of procedures for the disposal of hazardous waste in an organisation
- 6 Be able to support and maintain sustainability in an organisation

Guided learning hours

It is recommended that 14 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF174.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of keeping workplace waste to a minimum
- 1.2 Evaluate the main causes of waste that may occur in a business environment
- 1.3 Evaluate ways of minimising waste, including using technology and other procedures and their benefits
- 1.4 Explain the social and legal requirements for recycling and the disposal of waste
- 1.5 Explain the impact of social and legal requirements for recycling and disposal of waste on an organisation
- 1.6 Explain procedures for recycling materials and minimising waste that meet social and legal requirements for an organisation
- 1.7 Describe ways in which waste may be minimised by regularly maintaining equipment and the benefits of doing so
- 1.8 Explain procedures that can be used to make sure regular maintenance of equipment minimises waste

Outcome 2: Understand procedures for disposal of hazardous materials

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of procedures for the recycling and disposal of hazardous materials
- 2.2 Explain procedures for the recycling and disposal of hazardous materials for an organisation

Outcome 3: Understand ways of supporting and maintaining sustainability in an organisation

Assessment Criteria

The learner can:

- 3.1 Explain the benefits to an organisation of working to continuously improve efficiency and minimise waste over time
- 3.2 Explain how to involve all work colleagues in continuously improving working methods and use of technology to achieve maximum efficiency and minimum waste
- 3.3 Evaluate ways of selecting sources of materials, equipment and expertise that will give best value for money and maximum efficiency over time

- 3.4 Explain the purpose and benefits of considering issues of social responsibility when selecting suppliers

Outcome 4: Be able to support the minimisation of waste in an organisation

Assessment Criteria

The learner can:

- 4.1 Establish and maintain procedures to minimise waste in own area of responsibility
- 4.2 Make sure work tasks are completed keeping waste to a minimum
- 4.3 Make sure technology is used in work tasks in ways that minimises waste in own area of responsibility

Outcome 5: Be able to support the maintenance of procedures for the disposal of hazardous waste in an organisation

Assessment Criteria

The learner can:

- 5.1 Confirm and agree procedures for recycling and disposal of hazardous materials in own area of responsibility
- 5.2 Make sure procedures for recycling and disposal of hazardous materials are followed in own area of responsibility

Outcome 6: Be able to support and maintain sustainability in an organisation

Assessment Criteria

The learner can:

- 6.1 Confirm and maintain procedures for the maintenance of equipment so it supports efficiency and minimises waste in own area of responsibility
- 6.2 Make sure use of equipment maximises efficiency and minimises waste in own area of responsibility
- 6.3 Make sure ways of working efficiently and using technology to improve efficiency are consistently followed and developed in own area of responsibility
- 6.4 Make sure sources of equipment, materials and expertise that provide best value for money and reflect social responsibility are selected used in own area of responsibility
- 6.5 Confirm and maintain procedures within own area of responsibility that will help to develop and support other people in ways that maximises their efficiency, and their value to an organisation, over time

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.2	
3.	3.1 – 3.4	

appropriate to the learner's job role from the following sources:

- procedures
-

following sources:

- letters
 - emails
 - memos
 - reports
-

following sources:

- letters
 - emails
 - memos
 - reports
-

6.2 - 6.3
6.5

Evidence may be supplied via witness testimony and candidate reports/reflective accounts

6.4

Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- reports
- orders
- tenders
- quotes
- estimates

Unit 405

Assess, manage and monitor risk in a business environment

Level: 4

Credit value: 4

NDAQ number: H/601/2557

Unit aim

This unit is about taking a leading role in supporting the monitoring and managing of risk within own area of responsibility in a business environment so that an organisation's aims and objectives for minimising risk and ensuring a safe work environment can be supported at all times.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Understand how to assess, manage and monitor risk in a business environment
- 2 Be able to assess, manage and monitor risk in an organisation

Guided learning hours

It is recommended that 18 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF174.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 405

Assess, manage and monitor risk in a business environment

Outcome 1: Understand how to assess, manage and monitor risk in a business environment

Assessment Criteria

The learner can:

- 1.1 Describe sources of risk in a business environment, including health and safety
- 1.2 Describe ways of assessing and monitoring risks in an organisation
- 1.3 Explain how to judge when risks are acceptable
- 1.4 Describe ways of minimising risks in an organisation
- 1.5 Explain the importance of learning from mistakes made when dealing with risk

Outcome 2: Be able to assess, manage and monitor risk in an organisation

Assessment Criteria

The learner can:

- 2.1 Identify possible sources of risk in own area of responsibility
- 2.2 Recognise, identify and deal with new risks, as required
- 2.3 Assess the level of risks in own area of responsibility
- 2.4 Make judgements on acceptable risks
- 2.5 Confirm and maintain procedures for minimising risk in own area of responsibility
- 2.6 Confirm and maintain procedures for monitoring risk in own area of responsibility
- 2.7 Use outcomes of assessing and dealing with risk to make recommendations for improvement

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 - 2.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• risk assessments

2.5 – 2.6 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- procedures

2.7 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
-

Unit 406

Communicate in a business environment

Level: 4

Credit value: 3

NDAQ number: M/601/2562

Unit aim

This unit is about being able to communicate with other people in a business environment clearly, convincingly, and persuasively, in writing and verbally, using language in a variety of formats, styles and tones.

Learning outcomes

There are **eight** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of planning communication
- 2 Understand how to communicate in writing
- 3 Understand how to communicate verbally
- 4 Understand the purpose and value of feedback in developing communication skills
- 5 Be able to plan communication
- 6 Be able to communicate in writing
- 7 Be able to communicate verbally
- 8 Be able to identify and agree ways of further developing communication skills

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA616.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of planning communication**Assessment Criteria**

The learner can:

- 1.1 Explain the benefits of knowing the purpose of communications for
 - a individuals
 - b organisations
- 1.2 Explain the purpose of knowing the intended outcomes of communications
- 1.3 Explain the advantages and disadvantages of using particular methods of communication in differing situations

Outcome 2: Understand how to communicate in writing**Assessment Criteria**

The learner can:

- 2.1 Identify relevant sources of information that may be used when preparing written communication
- 2.2 Describe ways of finding and extracting key points from sources of information for written communication
- 2.3 Explain the purpose of written communication principles for using electronic forms of written communication in a business environment
- 2.4 Explain different styles and tones of language and situations when they may be used
- 2.5 Explain how to select the right tone and style for written communication
- 2.6 Explain the purpose of selecting and using language that suits the purpose of written communication
- 2.7 Describe ways of organising, structuring and presenting written information so it meets the needs of different audiences
- 2.8 Describe ways of checking information for accuracy of content
- 2.9 Explain the purpose of accurate use of grammar, punctuation and spelling
- 2.10 Explain what is meant by plain English, and why it is used
- 2.11 Explain the purpose of proofreading and checking written communications
- 2.12 Explain the purpose of recognising work that is 'important' and work that is 'urgent', and ways of doing so
- 2.13 Describe organisational procedures for saving and filing written communications

Outcome 3: Understand how to communicate verbally

Assessment Criteria

The learner can:

- 3.1 Describe ways of verbally presenting information and ideas in a way that is clear, convincing or persuasive
- 3.2 Describe ways of leading discussions to achieve objectives
- 3.3 Explain ways of adapting verbal contributions to suit different audiences, purposes and situations
- 3.4 Explain how to use and interpret body language and tone of voice
- 3.5 Describe methods of active listening and the benefits of doing so
- 3.6 Explain how to use language to suit different audiences and situations
- 3.7 Explain the purpose of seeking ideas and opinions from others, and for taking these into account
- 3.8 Give reasons why barriers to verbal communication may occur
- 3.9 Describe strategies for overcoming barriers to verbal communication
- 3.10 Explain the purpose of summarising verbal communication

Outcome 4: Understand the purpose and value of feedback in developing communication skills

Assessment Criteria

The learner can:

- 4.1 Explain ways of getting feedback on whether communications have achieved their purpose
- 4.2 Explain the purpose and benefits of using feedback to further develop communication skills

Outcome 5: Be able to plan communication

Assessment Criteria

The learner can:

- 5.1 Identify the purpose of communications, the audience(s) and the outcomes to be achieved
- 5.2 Decide on the level of formality / informality for different types of situations
- 5.3 Decide on the style and method of communication for different types of situations

Outcome 6: Be able to communicate in writing

Assessment Criteria

The learner can:

- 6.1 Identify sources of information that support the purpose of written communications
- 6.2 Evaluate information to extract points that support the purpose of written communications
- 6.3 Select the style and tone needed for written communications to support their purpose
- 6.4 Present information using a format, layout, style and house style suited to the subject matter, work situation and method of written communication
- 6.5 Use language that meets differing purposes and objectives of the written communications, and the needs of different audiences

- 6.6 Organise, structure and present information so that it is clear and accurate, and meets the needs of different audiences
- 6.7 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear
- 6.8 Proofread and check written communications and make amendments, as required
- 6.9 Recognise the difference between what is 'important' and what is 'urgent'
- 6.10 Produce written communications to meet deadlines
- 6.11 Keep a file copy of written communications sent

Outcome 7: Be able to communicate verbally

Assessment Criteria

The learner can:

- 7.1 Verbally present information and ideas to others so that they are clear, accurate, convincing and / or persuasive
- 7.2 Lead discussion(s) to achieve objectives
- 7.3 Adapt verbal contributions to discussions to suit audience, purpose and situation
- 7.4 Use body language and tone to meet the needs of audience, purpose and situation
- 7.5 Actively listen to information given by other people
- 7.6 Ask relevant questions to clarify own understanding, as required
- 7.7 Make relevant, well-argued responses using language to suit audience(s) and situation(s)
- 7.8 Give others opportunities to verbally contribute ideas and opinions and take these into account
- 7.9 Overcome barriers to verbal communication, where required
- 7.10 Summarise verbal communication(s) and make sure that the correct meaning has been understood

Outcome 8: Be able to identify and agree ways of further developing communication skills

Assessment Criteria

The learner can:

- 8.1 Get feedback to confirm whether communications have achieved their purpose
- 8.2 Use feedback to identify and agree ways of further developing own communication skills

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.13	
3.	3.1 – 3.10	
4.	4.1 – 4.2	

5.	5.1 – 5.3	
6.	6.1 – 6.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information selected
	6.4 – 6.8 6.10 – 6.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports •
	6.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
7.	7.1 7.3 – 7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
	7.2 7.5 – 7.10	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
8.	8.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •

Unit 407

Evaluate and solve business problems

Level: 4

Credit value: 6

NDAQ number: K/601/2558

Unit aim

This unit is about recognising that there is a problem with the way work is being carried out in a business environment, analysing the problem for possible causes and evaluating the problem in terms of the risks it presents if not solved.

Learning outcomes

There are **seven** learning outcomes to this unit.

The learner will:

- 1 Understand business problems, their causes and impact
- 2 Understand techniques for solving business problems
- 3 Understand organisational and regulatory factors that influence solutions to business problems
- 4 Understand how to evaluate approaches to solving business problems
- 5 Be able to recognise and analyse business problems
- 6 Be able to plan and carry out own solution to business problems
- 7 Be able to evaluate own solution to a business problem

Guided learning hours

It is recommended that 16 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAG128.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand business problems, their causes and impact**Assessment Criteria**

The learner can:

- 1.1 Explain ways of recognising when business problem exists
- 1.2 Explain how to identify possible causes of business problems
- 1.3 Describe how to assess risks or consequences of business problems
- 1.4 Explain how to analyse business problems and evaluate the relevance and importance of factors contributing to them

Outcome 2: Understand techniques for solving business problems**Assessment Criteria**

The learner can:

- 2.1 Explain different ways of solving business problems
- 2.2 Explain different ways of planning to solve business problems
- 2.3 Describe the purpose of identifying resource requirements needed
- 2.4 Explain the purpose and benefit of having support and feedback from others when solving business problems
- 2.5 Explain the purpose and benefit of regularly reviewing progress and adjusting plans when solving business problems
- 2.6 Explain how to recognise when a business problem has been solved

Outcome 3: Understand organisational and regulatory factors that influence solutions to business problems**Assessment Criteria**

The learner can:

- 3.1 Describe effects of organisational policies and procedures when solving business problems
- 3.2 Describe effects of legal or regulatory requirements when solving business problems

Outcome 4: Understand how to evaluate approaches to solving business problems**Assessment Criteria**

The learner can:

- 4.1 Describe ways of evaluating approaches to solving business problems
- 4.2 Describe ways of evaluating solutions to business problems for effectiveness
- 4.3 Explain the purpose of evaluating approaches and solutions to business problems

Outcome 5: Be able to recognise and analyse business problems

Assessment Criteria

The learner can:

- 5.1 Recognise business problems affecting work
- 5.2 Assess the risks presented by a business problem, and the possible impact of not resolving it
- 5.3 Analyse business problems, getting additional information, as required
- 5.4 Discuss with others to agree what the business problems are
- 5.5 Assess the relevance and importance of the factors contributing to business problems
- 5.6 Prioritise business problems according to its importance, complexity, impact and urgency

Outcome 6: Be able to plan and carry out own solution to business problems

Assessment Criteria

The learner can:

- 6.1 Develop and justify an approach for how to solve business problems
- 6.2 Develop and justify own plan to solve business problems
- 6.3 Identify and confirm ways of deciding when the business problem has been solved
- 6.4 Agree own plan, with others as required
- 6.5 Carry out own plan to solve business problems, involving others as required
- 6.6 Gather and use resources needed to solve business problems
- 6.7 Use support and feedback from others to help reach a solution
- 6.8 Regularly check progress towards solving business problems
- 6.9 Use feedback and progress reviews to adjust the plan, as required
- 6.10 Confirm that business problems have been solved, with others as required

Outcome 7: Be able to evaluate own solution to a business problem

Assessment Criteria

The learner can:

- 7.1 Evaluate own approach to solving business problems for its effectiveness
- 7.2 Evaluate own solution to business problems for its effectiveness
- 7.3 Evaluate alternative approaches and solutions for possible effectiveness

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.4	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.6	
3.	3.1 – 3.2	

4.	4.1 – 4.3	
5.	5.1 - 5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
6.	6.1 6.3 6.6 6.8	Evidence may be supplied via candidate reports/reflective accounts
	6.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • plans
	6.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • plans
	6.5 6.7 6.10	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	6.9	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • feedback • reviews

Unit 408

Make decisions in a business environment

Level: 4

Credit value: 4

NDAQ number: H/601/2560

Unit aim

This unit is about making decisions made in a business environment at the level where there is no requirement for formal legal or organisational procedures to be followed.

Learning outcomes

There are **seven** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and process of decision-making
- 2 Understand how to prepare to make decisions
- 3 Understand how to make decisions
- 4 Understand how to assess decisions and their effects
- 5 Be able to prepare background information to make decisions
- 6 Be able to make decisions
- 7 Be able to assess contributions to decision-making

Guided learning hours

It is recommended that 24 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAG122.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and process of decision-making**Assessment Criteria**

The learner can:

- 1.1 Evaluate situations where decision-making is required
- 1.2 Explain key stages in the decision-making process

Outcome 2: Understand how to prepare to make decisions**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose of knowing the context in which a decision is being made
- 2.2 Justify possible limitations on a person making decisions
- 2.3 Explain how to research information to be used to inform and influence decision-making
- 2.4 Evaluate sources of information that can be used to inform and influence decision-making

Outcome 3: Understand how to make decisions**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of meetings and other discussions where decisions are being made
- 3.2 Explain how to structure own ideas, information and recommendations to maximise their effectiveness
- 3.3 Explain the purpose and benefits of respecting other people's contributions to the decision-making process
- 3.4 Explain how to be proactive and engage with colleagues during the decision-making process
- 3.5 Justify the use of evidence, argument, questioning and assertiveness to influence outcomes
- 3.6 Explain the purpose of collective responsibility

Outcome 4: Understand how to assess decisions and their effects**Assessment Criteria**

The learner can:

- 4.1 Evaluate ways to monitor the effect of decisions and identify learning points
- 4.2 Explain how to review the decision-making process

Outcome 5: Be able to prepare background information to make decisions

Assessment Criteria

The learner can:

- 5.1 Research and collect information to add value to the decision-making process
- 5.2 Evaluate sources of information needed

Outcome 6: Be able to make decisions

Assessment Criteria

The learner can:

- 6.1 Identify and agree criteria for making a decision
- 6.2 Review information provided in order to make a decision
- 6.3 Structure ideas, information and recommendations in a logical and meaningful way
- 6.4 Present rationale and conclusions to others using accurate and current information
- 6.5 Provide additional information to support conclusions
- 6.6 Respond as required when asked to supply information to help with decision-making
- 6.7 Respect other people's contributions to the decision-making process
- 6.8 Use evidence, argument, questioning and assertiveness to justify decision(s)
- 6.9 Listen to other people's feedback and record for future evaluation
- 6.10 Confirm support for the decision(s)

Outcome 7: Be able to assess contributions to decision-making

Assessment Criteria

The learner can:

- 7.1 Assess contributions made to the decision-making process
- 7.2 Identify learning points to improve future decision-making

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 - 2.4	
3.	3.1 – 3.6	
4.	4.1 – 4.2	

5.	5.1	<p>Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • information collected • research carried out
	5.2	Evidence may be supplied via candidate reports/reflective accounts
6.	6.1 - 6.3	
	6.4 - 6.6 6.8 - 6.10	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports • presentations
	6.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

Unit 409

Negotiate in a business environment

Level: 4

Credit value: 7

NDAQ number: K/601/2561

Unit aim

This unit is about preparing for, and carrying out negotiations with other parties, in a business environment.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand how to prepare for negotiations
- 2 Understand how to conduct negotiations
- 3 Understand how to complete negotiations
- 4 Be able to prepare for negotiation
- 5 Be able to conduct negotiations
- 6 Be able to complete negotiations

Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAG124.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to prepare for negotiations**Assessment Criteria**

The learner can:

- 1.1 Explain the main principles of negotiation
- 1.2 Explain the process of negotiation and how it is used in business
- 1.3 Outline commercial and ethical frameworks that are important in negotiations
- 1.4 Analyse the purpose and benefits of different negotiation strategies and techniques
- 1.5 Explain the value of understanding the roles and levels of responsibility of other negotiators
- 1.6 Explain the purpose and benefits of understanding the objectives of the other negotiators
- 1.7 Explain the purpose of understanding own level of responsibility and authority in negotiations
- 1.8 Explain the purpose and benefits of research and preparation before negotiations
- 1.9 Analyse how differences in culture may impact on negotiations
- 1.10 Explain the purpose and benefits of having clear and realistic objectives for negotiations
- 1.11 Explain the purpose and benefits of having compromise positions

Outcome 2: Understand how to conduct negotiations**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of being flexible during negotiations while seeking to achieve the main objectives
- 2.2 Explain the purpose of keeping to the brief during negotiations
- 2.3 Explain the purpose of keeping to own level of authority during negotiations
- 2.4 Explain the purpose of referring issues to others, where required
- 2.5 Explain the purpose and benefits of keeping goodwill during negotiations, and ways of doing so

Outcome 3: Understand how to complete negotiations**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose and benefits of achieving a 'win-win' outcome
- 3.2 Explain the purpose of keeping an accurate record of negotiations, and agreeing the record
- 3.3 Explain the purpose of withdrawal from negotiations, where needed

Outcome 4: Be able to prepare for negotiation

Assessment Criteria

The learner can:

- 4.1 Prepare a negotiating brief
- 4.2 Identify and prioritise objectives and compromise positions
- 4.3 Identify objectives other negotiators may have
- 4.4 Research and assess the strength of the other negotiators
- 4.5 Identify potential problems in negotiations and suggest solutions to overcome them
- 4.6 Make sure all involved in the negotiations are fully briefed and prepared

Outcome 5: Be able to conduct negotiations

Assessment Criteria

The learner can:

- 5.1 Carry out negotiations in line with the commercial and ethical frameworks of an organisation
- 5.2 Carry out negotiations within limits of own authority
- 5.3 Make proposals which meet personal / organisational objectives, and those of the people being negotiated with (where possible)
- 5.4 Adapt negotiation strategy to obtain results that meet minimum or agreed outcomes
- 5.5 Clarify other people's understanding, and respond to their queries and objections
- 5.6 Suggest solutions to deal with problems
- 5.7 Refer the negotiations when matters arise which require authorisation
- 5.8 Carry out negotiations in a way that creates goodwill and promotes a positive image of an organisation

Outcome 6: Be able to complete negotiations

Assessment Criteria

The learner can:

- 6.1 Reach an agreement to the satisfaction of all those involved in the negotiations, where possible
- 6.2 Maintain clear and correct records of the negotiations and agree them with all involved
- 6.3 Withdraw from negotiations to re-consider current position, if necessary
- 6.4 Complete negotiations in a way that creates goodwill and promotes a positive image of an organisation

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.11	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.5	

3.	3.1 – 3.3	
4.	4.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • negotiating brief
	4.2 - 4.3 4.5	Evidence may be supplied via candidate reports/reflective accounts
	4.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • research carried out
	4.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • presentation • reports
5.	5.1 - 5.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • proposals
	5.5 - 5.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 - 6.2 6.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports

Unit 410

Design and develop an information system

Level: 4

Credit value: 7

NDAQ number: T/601/2563

Unit aim

This unit is about designing and developing an information system that will meet identified needs in a business environment.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of information systems in a business environment
- 2 Understand how to design and develop an information system
- 3 Be able to design and develop an information system

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD112.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of information systems in a business environment

Assessment Criteria

The learner can:

- 1.1 Evaluate the types of information that need to be managed in a business environment
- 1.2 Analyse the types of information systems available and their main features

Outcome 2: Understand how to design and develop an information system

Assessment Criteria

The learner can:

- 2.1 Analyse the purpose and benefits of identifying and agreeing user needs for an information system
- 2.2 Explain the purpose and benefits of developing a system specification based on agreed needs
- 2.3 Analyse ways of developing a specification for an information system
- 2.4 Analyse ways of creating and developing an information system based on agreed needs
- 2.5 Explain the purpose and benefits of testing an information system during development

Outcome 3: Be able to design and develop an information system

Assessment Criteria

The learner can:

- 3.1 Identify and analyse the information to be managed
- 3.2 Identify the resources available
- 3.3 Develop a system specification within agreed budget, as required
- 3.4 Develop an information system that meets the specification
- 3.5 Test the system
- 3.6 Identify, report and remedy faults

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.5	

3.	3.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">•
	3.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">•
	3.3	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• specification•
	3.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• information system•
	3.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• test results•
	3.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos•

Unit 411

Manage and evaluate an information system

Level: 4

Credit value: 6

NDAQ number: A/601/2564

Unit aim

This unit is about managing and evaluating an information system that meets identified needs in a business environment. The learner will use knowledge of needs, to work in collaboration with others as required, to manage and evaluate the system.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand how to manage an information system
- 2 Understand how to review and further develop an information system
- 3 Be able to manage an information system
- 4 Be able to evaluate an information system

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD112.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to manage an information system**Assessment Criteria**

The learner can:

- 1.1 Analyse how to plan and agree implementation of the information system
- 1.2 Analyse the purpose and benefits of managing information to meet requirements
- 1.3 Explain the purpose and benefits of providing training to users and providing on-going support
- 1.4 Explain the purpose of complying with legal and organisation requirements when using an information system
- 1.5 Explain the purpose and benefits of monitoring use of an information system
- 1.6 Analyse ways of monitoring use of an information system
- 1.7 Explain the purpose and benefits of maintaining and updating an information system
- 1.8 Analyse ways of maintaining and updating an information system
- 1.9 Analyse the types of problems that may occur with an information system and how to deal with them

Outcome 2: Understand how to review and further develop an information system**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of continuously improving an information system
- 2.2 Analyse ways of evaluating an information system
- 2.3 Explain how to identify problems in an information system and analyse them
- 2.4 Analyse ways of resolving problems in an information system

Outcome 3: Be able to manage an information system**Assessment Criteria**

The learner can:

- 3.1 Provide training on the use of an information system
- 3.2 Provide on-going support to users
- 3.3 Monitor use of accuracy and productivity of an information system to meet organisational requirements
- 3.4 Make sure legal and organisational requirements for handling information are followed
- 3.5 Make sure an information system is maintained and updated, if required
- 3.6 Identify, analyse and resolve problems when they occur

Outcome 4: Be able to evaluate an information system

Assessment Criteria

The learner can:

- 4.1 Collect feedback on performance of an information system
- 4.2 Evaluate feedback and prioritise development needs of an information system, if required
- 4.3 Provide information to enable further information system development

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• training records
	3.2 3.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• notes of meetings
	3.3 – 3.5	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
4.	4.1 – 4.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• notes of meetings

Unit 412

Prepare specifications for contracts

Level: 4

Credit value: 5

NDAQ number: F/601/2565

Unit aim

This unit is about understanding, and preparing the information that is needed to award a contract for work.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand work contracts
- 2 Understand how to prepare for selection
- 3 Be able to prepare specifications for work
- 4 Be able to agree selection criteria

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF132.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand work contracts

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of contracts and other forms of agreement
- 1.2 Describe different types of contracts and agreements
- 1.3 Evaluate different types of contract and agreement for their intended purpose
- 1.4 Explain the purpose of legal, regulatory and organisational requirements that may govern contracts
- 1.5 Identify a range of terminology used in contracts and explain its purpose
- 1.6 Explain the purpose and benefits of requirements and specifications in contracts

Outcome 2: Understand how to prepare for selection

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of prioritising requirements
- 2.2 Explain the purpose and value of developing objective selection criteria

Outcome 3: Be able to prepare specifications for work

Assessment Criteria

The learner can:

- 3.1 Identify requirements for contractor(s), consulting with others where required
- 3.2 Prioritise requirements and prepare specifications for the products and services to be provided, consulting with others where required

Outcome 4: Be able to agree selection criteria

Assessment Criteria

The learner can:

- 4.1 Prepare selection criteria
- 4.2 Agree selection criteria, where required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.2	
3.	3.1 - 3.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports
4.	4.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• list of criteria
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• list of criteria• letters• emails• memos• reports

Unit 413

Chair meetings

Level: 4

Credit value: 4

NDAQ number: J/601/2566

Unit aim

This unit is about the role of the chairperson before, during and after business meetings.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand the role of the chair in meetings
- 2 Be able to prepare for chairing a meeting
- 3 Be able to chair a meeting using interpersonal and organisational skills
- 4 Be able to follow up and evaluate a meeting that has been chaired

Guided learning hours

It is recommended that 16 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA413.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the role of the chair in meetings**Assessment Criteria**

The learner can:

- 1.1 Explain the role of the chair before, during and after a meeting
- 1.2 Analyse different types of meetings and how to run them
- 1.3 Explain the purpose of preparing for formal meetings
- 1.4 Explain the reasons for agreeing the purpose of meetings
- 1.5 Explain the reasons for agreeing the timing of the meeting to make sure key people can attend or be represented
- 1.6 Describe how to chair meetings to keep to agreed timings, as required
- 1.7 Explain the reasons for giving people information about facilities and arrangements, including health and safety procedures
- 1.8 Explain the benefits of effective communication skills
- 1.9 Explain how effective interpersonal skills can impact on the success of meetings
- 1.10 Explain how to facilitate discussions so that the purpose of each agenda item is achieved
- 1.11 Explain how to summarise discussions and agree actions at appropriate points
- 1.12 Analyse techniques for keeping to meeting timings, agenda, and purpose
- 1.13 Explain reasons for liaising with meeting organiser if not the chair
- 1.14 Describe the types of problems that may occur when chairing meetings, and how to resolve them
- 1.15 Describe the purpose of approving records of meetings
- 1.16 Explain the purpose of follow up actions, and evaluation of meetings
- 1.17 Explain the purpose of reflecting on whether the meeting met its purpose and agreeing learning points for the future

Outcome 2: Be able to prepare for chairing a meeting**Assessment Criteria**

The learner can:

- 2.1 Agree the purpose of a meeting
- 2.2 Agree the scheduling of a meeting so that key people can attend
- 2.3 Make sure meeting facilities meet requirements
- 2.4 Agree agenda items for a meeting, including timing and any papers required to achieve purpose
- 2.5 Read briefing papers and identify key issues, consulting as required
- 2.6 Liaise with meeting organiser if not the chair of the meeting

Outcome 3: Be able to chair a meeting using interpersonal and organisational skills

Assessment Criteria

The learner can:

- 3.1 Greet people attending the meeting
- 3.2 Keep to timings as required
- 3.3 Give details of facilities and arrangements
- 3.4 Follow an agenda
- 3.5 Make sure those present have an opportunity to contribute to the meeting
- 3.6 Keep the meeting on track to achieve its purpose
- 3.7 Resolve any problems that occur
- 3.8 Summarise discussions and agree actions
- 3.9 Observe formal voting and approval procedures, if required
- 3.10 Agree date, time and location of next meeting, if required
- 3.11 Close the meeting on time

Outcome 4: Be able to follow up and evaluate a meeting that has been chaired

Assessment Criteria

The learner can:

- 4.1 Approve a meeting record and list of actions
- 4.2 Make sure agreed actions are implemented
- 4.3 Evaluate the outcomes of a meeting in terms of its purpose
- 4.4 Agree learning points for future meetings, if required

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.17	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• agendas•

	2.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports
3.	3.1 – 3.11	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the</p> <p>'s j</p> <ul style="list-style-type: none"> •
4.	4.1 - 4.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the</p> <p>'s j</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports
	4.3 – 4.4	<p>Evidence may be supplied via candidate reports/reflective accounts and professional discussion</p>

Unit 414

Manage an office facility

Level: 4

Credit value: 6

NDAQ number: L/601/2567

Unit aim

This unit is about managing an office facility, making sure that the systems and procedures, facilities and equipment needed to meet the expectations of all users for the smooth running of the office are in place, and evaluating use for possible changes and new needs.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand how to provide, maintain and manage an office facility that meets the expectations of its users
- 2 Understand how to deal with problems when managing office facilities and equipment
- 3 Understand the purpose of health, safety, access and security requirements in an office
- 4 Be able to manage an office facility

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA118.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to provide, maintain and manage an office facility that meets the expectations of its users**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of providing and maintaining an office facility that meets the needs of its users in line with agreed budgets
- 1.2 Evaluate a range of facilities, equipment and resources for an office, and explain what they can be used for
- 1.3 Explain the purpose and benefits of identifying and regularly reviewing the needs of office users and ways of doing so
- 1.4 Explain the purpose of having office systems and procedures
- 1.5 Describe and evaluate systems and procedures suitable for an office within own area of responsibility
- 1.6 Explain how to develop office systems and procedures within own area of responsibility
- 1.7 Explain the purpose and benefits of building relationships with internal and external suppliers and ways of doing so
- 1.8 Explain the purpose and benefits of giving users information, guidance and support for following office systems and procedures, and for using facilities and equipment
- 1.9 Explain the purpose and benefits of controlling office facilities
- 1.10 Explain the purpose and benefits of monitoring, reviewing and evaluating different types of activities to make sure an office facility meets the needs of its users

Outcome 2: Understand how to deal with problems when managing office facilities and equipment**Assessment Criteria**

The learner can:

- 2.1 Explain how to identify and organise repairs needed to the facilities and equipment of an office
- 2.2 Describe procedures for dealing with repairs needed
- 2.3 Explain the types of problems that arise when managing an office facility
- 2.4 Explain the purpose and benefits of having a strategy to deal with problems, and how to develop a strategy for dealing with problems

Outcome 3: Understand the purpose of health, safety, access and security requirements in an office

Assessment Criteria

The learner can:

- 3.1 Explain why health, safety, access and security are important in an office environment
- 3.2 Describe the main health, safety, access and security requirements that are important in an office environment
- 3.3 Identify health, safety, access and security requirements for an office in own area of responsibility, including its facilities and equipment

Outcome 4: Be able to manage an office facility

Assessment Criteria

The learner can:

- 4.1 Provide office facilities and equipment to meet the needs of users, in line with agreed budgets
- 4.2 Maintain office facilities and equipment to meet the needs of users
- 4.3 Co-ordinate the use of facilities and equipment for an office
- 4.4 Set up, explain, review and evaluate systems and procedures for an office, identifying changes in requirements, as needed
- 4.5 Monitor, review and evaluate office systems and procedures, taking account of feedback from users
- 4.6 Make sure the equipment in an office is working correctly and meets expectations of the users
- 4.7 Identify and organise repairs needed to the facilities and equipment in an office
- 4.8 Make sure the environment of an office supports productive working
- 4.9 Maintain relationships with internal and external suppliers and look for opportunities to develop relationships
- 4.10 Monitor use and take action as needed to maintain the health, safety and security of office users
- 4.11 Identify, analyse and resolve problems with facilities and equipment in an office
- 4.12 Provide information and guidance to users on the facilities and equipment in an office
- 4.13 Agree priorities for the supply, maintenance and use of office facilities and equipment with users
- 4.14 Control use of office facilities in own area of responsibility

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.10	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.4	
3.	3.1 – 3.3	

4.	4.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • budgets •
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
	4.3 4.7 - 4.8 4.14	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • reports • records •
	4.4 - 4.5 4.10 – 4.13	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports • records •
	4.6	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	4.9	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails •

Unit 415

Propose and design administrative services

Level: 4

Credit value: 8

NDAQ number: Y/601/2569

Unit aim

This unit is about researching and using the information gathered to propose and design administrative services for an organisation, that will meet the needs of all users, and which will meet legal and organisational requirements.

Learning outcomes

There are **seven** learning outcomes to this unit.

The learner will:

- 1 Understand factors affecting the design of administrative services
- 2 Understand how to develop designs for administrative services
- 3 Understand how to consult on designs for administrative services
- 4 Understand how to support the agreement of designs for administrative services
- 5 Be able to propose administrative services
- 6 Be able to design administrative services from specifications
- 7 Be able to agree a design for administrative services

Guided learning hours

It is recommended that 36 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA119.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand factors affecting the design of administrative services**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of reviewing administrative services and making appropriate improvements
- 1.2 Describe organisational policies and procedures that may affect administrative services and their development
- 1.3 Identify legal and regulatory requirements that affect the design of an organisation's administrative services
- 1.4 Explain the purpose and benefits of producing designs which reflect realistic timescales and costs, and ways of doing so

Outcome 2: Understand how to develop designs for administrative services**Assessment Criteria**

The learner can:

- 2.1 Identify the limits of own job role in relation to the development of administrative services for an organisation
- 2.2 Explain how to develop systems and procedures that make sure administrative services achieve required outcomes
- 2.3 Explain the purpose of developing detailed specifications for administrative services
- 2.4 Describe how to develop detailed specifications and budgets for administrative services
- 2.5 Explain the purpose of keeping full and accurate records when developing specifications for administrative services
- 2.6 Explain the purpose and benefits of developing a range of options for the design of administrative services
- 2.7 Describe how to develop different design options

Outcome 3: Understand how to consult on designs for administrative services**Assessment Criteria**

The learner can:

- 3.1 Identify the users of administrative services in organisations
- 3.2 Identify the decision makers for administrative services in organisations
- 3.3 Describe ways of encouraging users to comment on the effectiveness of administrative services
- 3.4 Describe how to use information to evaluate administrative services

- 3.5 Explain how to identify possible improvements in administrative services and their benefits
- 3.6 Identify who to contact in organisations for advice when developing specifications for, and designing administrative services
- 3.7 Explain the purpose and benefits of consulting on design options
- 3.8 Identify who should be consulted within organisations on the design of administrative services
- 3.9 Describe how to organise consultation on the design of administrative services

Outcome 4: Understand how to support the agreement of designs for administrative services

Assessment Criteria

The learner can:

- 4.1 Identify the types of information and advice that people may need to make a decision on design options
- 4.2 Explain the purpose of negotiating designs and specifications for administrative services
- 4.3 Describe ways of negotiating designs and specifications with users and decision makers

Outcome 5: Be able to propose administrative services

Assessment Criteria

The learner can:

- 5.1 Encourage users to comment on the effectiveness of administrative services
- 5.2 Identify administrative services that could be developed and the benefits that could follow
- 5.3 Suggest possible developments and take account of feedback given
- 5.4 Work with users to agree requirements for administrative services and the systems and procedures needed to support them
- 5.5 Develop specifications consistent with agreed requirements
- 5.6 Agree specifications and budget
- 5.7 Record agreed specifications in sufficient detail for the administrative services to be designed

Outcome 6: Be able to design administrative services from specifications

Assessment Criteria

The learner can:

- 6.1 Produce design options for administrative services consistent with agreed specifications and budget
- 6.2 Consult with users and decision makers when developing design options
- 6.3 Make sure design options meet legal and organisational requirements
- 6.4 Make sure design options support organisational policies and objectives

Outcome 7: Be able to agree a design for administrative services

Assessment Criteria

The learner can:

- 7.1 Present design options in a form and style to help users and decision makers understand design options
- 7.2 Assess the strengths and weaknesses of design options
- 7.3 Provide the information and advice needed to enable agreement of a final design
- 7.4 Record final design in sufficient detail for implementation

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.4	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.7	
3.	3.1 – 3.9	
4.	4.1 – 4.3	
5.	5.1 5.3 - 5.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • questionnaires •
	5.2	Evidence may be supplied via candidate reports/reflective accounts
	5.5 5.7	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
	5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • specifications •

6.	6.1	<p>Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • specifications • budgets • designs • consultation documents •
	6.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role</p>
6.	6.3 – 6.4	<p>Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> •
7.	7.1 7.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • memos • emails • minutes of meetings • designs • presentations •
	7.2	<p>Evidence may be supplied via candidate reports/reflective accounts</p>
	7.4	<p>Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • design •

Unit 416

Prepare, co-ordinate and monitor operational plans

Level: 4

Credit value: 6

NDAQ number: L/601/2570

Unit aim

This unit is about preparing and co-ordinating delivery of operational plans across one or more work activities or areas of responsibility.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand factors affecting the preparation, co-ordination and monitoring of operational plans
- 2 Understand how to prepare operational plans
- 3 Be able to prepare operational plans
- 4 Be able to co-ordinate and monitor operational plans

Guided learning hours

It is recommended that 26 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA1110.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 416

Prepare, co-ordinate and monitor operational plans

Outcome 1: Understand factors affecting the preparation, co-ordination and monitoring of operational plans

Assessment Criteria

The learner can:

- 1.1 Explain the purpose of having limits of authority when preparing and co-ordinating operational plans
- 1.2 Explain the purpose and benefits of co-ordinating operational plans
- 1.3 Explain the effects of organisational priorities, objectives and constraints on operational plans
- 1.4 Explain how to identify risks and contingencies
- 1.5 The benefits of clear communication when planning and co-ordinating operations
- 1.6 Explain the purpose of negotiating and agreeing operational plans, and how to do so
- 1.7 Describe the possible effects of legal and regulatory requirements on operational plans
- 1.8 Explain the effects on operational plans of organisational policies and procedures related to work methods and activities
- 1.9 Explain how to get valid and relevant information to monitor operational plans accurately
- 1.10 Explain the purpose and benefits of continuously looking for opportunities to improve performance against operational plans

Outcome 2: Understand how to prepare operational plans

Assessment Criteria

The learner can:

- 2.1 Explain a range of planning techniques and tools that can be used to prepare operational plans
- 2.2 Explain how to identify and prioritise outcomes for operational plans
- 2.3 Describe ways of identifying the activities and resources needed to achieve agreed outcomes
- 2.4 Explain the purpose and benefits of having realistic schedules for operational plans
- 2.5 Explain the purpose and benefits of reviewing operational plans as they are developed
- 2.6 Describe methods for identifying and negotiating roles and responsibilities for operational plans
- 2.7 Explain the purpose of understanding the range of work methods and activities that can be used to deliver operational outcomes
- 2.8 Explain the purpose and benefits of making best use of resources

Outcome 3: Be able to prepare operational plans

Assessment Criteria

The learner can:

- 3.1 Prepare operational plans to co-ordinate relevant operations
- 3.2 Prioritise and agree required outcomes from operational plans
- 3.3 Identify risks within operational plans and contingencies to deal with them
- 3.4 Specify actions and resources needed to achieve outcomes of operational plans
- 3.5 Make sure operational plans meet legal and regulatory requirements, if required
- 3.6 Make sure operational plans meet organisational policies and procedures related to work methods and activities

Outcome 4: Be able to co-ordinate and monitor operational plans

Assessment Criteria

The learner can:

- 4.1 Make sure operational plans are in line with organisational priorities, objectives and constraints
- 4.2 Provide clear and relevant information to all who need it
- 4.3 Negotiate and agree changes to operational plans
- 4.4 Review and update operational plans to show changes in the working environment or objectives
- 4.5 Negotiate roles and responsibilities for implementing operational plans
- 4.6 Check that relevant people understand their roles and responsibilities for operational plans
- 4.7 Negotiate work methods and activities to deliver operational plans
- 4.8 Negotiate resources needed for operational plans and make sure best use is made of them
- 4.9 Negotiate prompt and corrective actions if operations are not in line with operational plans
- 4.10 Obtain sufficient, valid and relevant information to monitor operations against operational plans
- 4.11 Communicate changes in operational plans which affect work methods and activities promptly and accurately
- 4.12 Identify opportunities to improve operations

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.10	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.8	
3.	3.1 3.3 3.5 – 3.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: •

	3.2 3.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports
4.	4.1 4.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner 's job role from the following sources: <ul style="list-style-type: none"> • plans
	4.2 – 4.3 4.5 - 4.11	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • presentations
	4.12	Evidence may be supplied via candidate reports/reflective accounts

Unit 417

Implement, monitor and maintain administrative services

Level: 4

Credit value: 7

NDAQ number: Y/601/2572

Unit aim

This unit is about implementing administrative services, monitoring these services to make sure they are being used correctly, informing and supporting users of the systems, and making adjustments to the services to improve their performance.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand how to implement administrative services
- 2 Understand how to monitor administrative services
- 3 Understand how to maintain administrative services
- 4 Be able to implement administrative services for an organisation
- 5 Be able to monitor administrative services
- 6 Be able to maintain administrative services

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA122.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 417

Implement, monitor and maintain administrative services

Outcome 1: Understand how to implement administrative services

Assessment Criteria

The learner can:

- 1.1 Explain the purpose of having limits to own authority in relation to the implementation and monitoring of administrative services
- 1.2 Explain who may be involved in implementing or making changes to administrative services in an organisation
- 1.3 Explain the purpose and benefits of having systems and procedures to support administrative services
- 1.4 Explain who may be affected by changes to existing administrative services or the implementation of new services in an organisation
- 1.5 Describe ways of communicating implementation plans and changes to administrative services
- 1.6 Identify legal and regulatory requirements relevant to administrative services
- 1.7 Explain the purpose and benefits of involving people in planning how administrative services will be implemented
- 1.8 Describe how to involve people in planning how administrative services will be implemented
- 1.9 Explain how to develop plans for implementation
- 1.10 Explain how to negotiate and agree plans and changes with people
- 1.11 Explain the purpose of providing support to users
- 1.12 Explain the types of support available and how to choose and provide different types of support
- 1.13 Explain how to identify possible disruptions to work output and the working environment, and reasons for doing so

Outcome 2: Understand how to monitor administrative services

Assessment Criteria

The learner can:

- 2.1 Explain the purpose of checking administrative services to make sure they are being used correctly
- 2.2 Describe ways of checking administrative services, and when to use them
- 2.3 Describe what types of action to take if services are not being used correctly
- 2.4 Explain how to decide what action to take

Outcome 3: Understand how to maintain administrative services

Assessment Criteria

The learner can:

- 3.1 Describe ways of encouraging users to comment and make suggestions
- 3.2 Explain how to select ways of encouraging comment and suggestions
- 3.3 Explain what is meant by valid and reliable information on administrative services and ways of collecting it
- 3.4 Explain how to use information to evaluate the effectiveness of administrative services
- 3.5 Explain the purpose of having limits on own authority for making improvements
- 3.6 Identify people in an organisation to whom recommendations for improvements to administrative services should be made, when outside limits of own responsibility

Outcome 4: Be able to implement administrative services for an organisation

Assessment Criteria

The learner can:

- 4.1 Make a plan with users for implementing administrative services
- 4.2 Negotiate and agree a plan for implementing of administrative services
- 4.3 Communicate an agreed plan and any changes to stakeholders
- 4.4 Make changes to a plan from feedback given, as required
- 4.5 Make sure all those involved in implementing a plan understand their roles and responsibilities
- 4.6 Make sure a plan meets legal and regulatory requirements, as needed
- 4.7 Provide support to users so they can use the administrative services and procedures
- 4.8 Plan and take action, as needed, to minimise disruptions to work activities and the work environment during implementation
- 4.9 Follow a plan to implement administrative services

Outcome 5: Be able to monitor administrative services

Assessment Criteria

The learner can:

- 5.1 Monitor administrative services for correct use
- 5.2 Take action, as needed, where administrative services are not being used correctly

Outcome 6: Be able to maintain administrative services

Assessment Criteria

The learner can:

- 6.1 Encourage users to comment on administrative services and to make suggestions for improvement
- 6.2 Collect valid and reliable information about the use of administrative services

- 6.3 Use feedback from users and information collected to evaluate administrative services provided, and identify areas for improvement
- 6.4 Make improvements to administrative services within limits of own authority
- 6.5 Make sure improvements to administrative services follow legal and regulatory requirements, as necessary
- 6.6 Communicate improvements to all involved
- 6.7 Make recommendations for improvements to administrative services which are outside limits of own authority

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.13	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.4	
3.	3.1 – 3.6	
4.	4.1 – 4.2 4.5 4.7 – 4.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings •
	4.3 – 4.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings •
	4.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •
5.	5.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> •

	5.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings • questionnaires • consultation documents
6.	6.1 6.6 – 6.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings
	6.2 – 6.3	<p>Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • information collected • feedback received
	6.4 – 6.5	<p>Evidence may be supplied via candidate reports/reflective accounts</p>

Unit 418

Contribute to innovation in a business environment

Level: 4

Credit value: 6

NDAQ number: K/601/2575

Unit aim

This unit is about identifying and evaluating new ideas for innovation in the business environment.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and benefits of innovation in a business environment
- 2 Understand how to research, develop and review ideas for new approaches and solutions
- 3 Understand how to present suggestions for new approaches and solutions
- 4 Be able to research and develop ideas for new approaches and solutions
- 5 Be able to present suggestions for new approaches and solutions
- 6 Be able to evaluate, review and make suggestions for new approaches and solutions

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA113.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 418

Contribute to innovation in a business environment

Outcome 1: Understand the purpose and benefits of innovation in a business environment

Assessment Criteria

The learner can:

- 1.1 Evaluate the purpose of innovation as a way of staying competitive and offering new solutions
- 1.2 Explain the purpose of questioning existing ways of working and assumptions about them

Outcome 2: Understand how to research, develop and review ideas for new approaches and solutions

Assessment Criteria

The learner can:

- 2.1 Explain the purpose of reviewing existing products and services, and ways of doing so
- 2.2 Evaluate ways of reviewing existing products and services
- 2.3 Identify sources of information for new approaches and solutions
- 2.4 Describe ways of collecting information on possible improvements
- 2.5 Explain the purpose of working with others when developing new approaches and solutions
- 2.6 Explain the purpose and benefits of working with others when agreeing how to present ideas to decision-makers
- 2.7 Evaluate how to work with others to develop and agree an idea
- 2.8 Explain the purpose and benefits of acknowledging contributions made by others
- 2.9 Explain how to evaluate ideas, including cost / benefit and impact analysis
- 2.10 Explain how to question assumptions to develop concepts and propositions
- 2.11 Explain the purpose of reviewing and learning from mistakes

Outcome 3: Understand how to present suggestions for new approaches and solutions

Assessment Criteria

The learner can:

- 3.1 Explain the purpose of selling ideas to decision-makers
- 3.2 Analyse how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome
- 3.3 Explain the purpose of risk analysis
- 3.4 Explain when it is appropriate to take 'acceptable' risks

- 3.5 Evaluate the purpose and benefits of accepting feedback
- 3.6 Explain how to develop and document proposals for change

Outcome 4: Be able to research and develop ideas for new approaches and solutions

Assessment Criteria

The learner can:

- 4.1 Question constructively existing ways of working in own area of responsibility
- 4.2 Research and identify possible improvements to working methods, services or products in own area of responsibility
- 4.3 Collect information that can be used to develop ideas for new approaches and solutions
- 4.4 Carry out a risk analysis
- 4.5 Agree criteria for evaluating ideas including fit with organisational aims and objectives

Outcome 5: Be able to present suggestions for new approaches and solutions

Assessment Criteria

The learner can:

- 5.1 Put forward a formal proposal of new approaches and / or solutions
- 5.2 Communicate risks to others in a suitable format

Outcome 6: Be able to evaluate, review and make suggestions for new approaches and solutions

Assessment Criteria

The learner can:

- 6.1 Identify the cost and benefits of new ideas to include
 - a) resources required
 - b) assessment of impact on others
- 6.2 Evaluate ideas for new approaches and solutions using
 - a) fit with organisational aims and objectives
 - b) other agreed criteria
- 6.3 Evaluate ideas to challenge own assumptions and thinking about ways of working
- 6.4 Put forward a formal proposal to persuade decision-makers of the benefits of your idea(s)
- 6.5 Communicate and sell ideas to others
- 6.6 Seek feedback on ideas, analyse feedback, and show a willingness to adapt
- 6.7 Assess idea(s) and decide whether a suggestion for a new approach / solution is possible

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.11	
3.	3.1 – 3.6	
4.	4.1 – 4.2 4.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings
	4.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information collected
	4.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • risk assessment
5.	5.1 – 5.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 - 6.5 6.7	<ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings • formal proposal
	6.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • feedback received

Unit 419

Plan change for a team

Level: 4

Credit value: 6

NDAQ number: M/601/2576

Unit aim

This unit is about planning changes across teams in a department or part of an organisation at the level of a departmental manager or director.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and value of planning change
- 2 Understand the role of the team and individuals in planning change
- 3 Understand the purpose and value of communication when planning change
- 4 Understand the purpose and value of negotiation and dealing with problems when planning change
- 5 Be able to identify and develop opportunities for change for a team
- 6 Be able to plan change for a team

Guided learning hours

It is recommended that 22 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA114.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and value of planning change

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of planning change for a team to organisations, individuals and a team

Outcome 2: Understand the role of the team and individuals in planning change

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of engaging the team and individuals in planning change
- 2.2 Explain the purpose and benefits of encouraging the team and individuals to feel that they are making contributions to planning change
- 2.3 Explain the purpose and benefits of using a team and individuals to challenge ways of working constructively and creatively when planning change

Outcome 3: Understand the purpose and value of communication when planning change

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and benefits of having goals for changes in a team and communicating them to those involved
- 3.2 Explain the purpose and benefits of making sure decision-makers are committed to planned changes

Outcome 4: Understand the purpose and value of negotiation and dealing with problems when planning change

Assessment Criteria

The learner can:

- 4.1 Explain the purpose and benefits of being adaptable during change planning and the change process
- 4.2 Explain the purpose and benefits of being able to renegotiate plans for changes
- 4.3 Analyse the types of problems and risks that may occur while planning change
- 4.4 Explain ways of responding to problems while planning change
- 4.5 Explain the purpose and benefits of dealing with problems when planning change

Outcome 5: Be able to identify and develop opportunities for change for a team

Assessment Criteria

The learner can:

- 5.1 Recognise opportunities for change for a team
- 5.2 Review options for change in terms of the constraints, risks, benefits, costs and implications for a team
- 5.3 Identify the risks and benefits for a team associated with options for change
- 5.4 Persuade the team to commit itself to change

Outcome 6: Be able to plan change for a team

Assessment Criteria

The learner can:

- 6.1 Encourage individuals and the team to challenge existing ways of working and put forward new ideas
- 6.2 Plan change for a team identifying vision, goals, objectives, timescales and resources
- 6.3 Agree plans for change with relevant decision-makers, as required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.2	
4.	4.1 – 4.5	
5.	5.1 - 5.3	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	5.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 6.3	<ul style="list-style-type: none">• letters• emails• memos• reports• presentations• minutes of meetings• initial plan

6.2

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- plan
- letters
- emails
- memos
- reports
- minutes of meetings

Unit 420

Manage budgets

Level: 4

Credit value: 5

NDAQ number: T/601/2580

Unit aim

This unit is about managing and monitoring a budget for a department or section within an organisation.

Learning outcomes

There are **five** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of budgets
- 2 Understand how to manage budgets
- 3 Understand how to report performance against budgets
- 4 Be able to manage budgets
- 5 Be able to monitor budgets

Guided learning hours

It is recommended that 29 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA533.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of budgets

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently
- 1.2 Identify legal, regulatory and organisational requirements for managing a budget
- 1.3 Describe different types of budgetary systems and their features

Outcome 2: Understand how to manage budgets

Assessment Criteria

The learner can:

- 2.1 Describe methods for monitoring, controlling and recording income and expenditure
- 2.2 Describe ways in which costs may be minimised in own area of responsibility
- 2.3 Identify situations in which corrective action may be needed
- 2.4 Describe the scope of own authority for managing a budget and authorising expenditure

Outcome 3: Understand how to report performance against budgets

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and benefits of reporting information on performance against budget
- 3.2 Explain how to check the accuracy of budget calculations
- 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets

Outcome 4: Be able to manage budgets

Assessment Criteria

The learner can:

- 4.1 Control budget performance within limits and deadlines
- 4.2 Analyse and take action to minimise costs where possible
- 4.3 Take corrective action to make sure of best value for money
- 4.4 Authorise expenditure within the scope of own authority

Outcome 5: Be able to monitor budgets

Assessment Criteria

The learner can:

- 5.1 Record transactions, as required
- 5.2 Produce information on performance against budget, when required
- 5.3 Make sure all calculations are accurate
- 5.4 Record information that will help with the preparation of future budgets

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.4	
3.	3.1 – 3.3	
4.	4.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• budgets•
	4.2 - 4.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• budgets•
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• records•
	5.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• information produced•

5.3 Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- calculations
-

5.4 Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- information produced
-

Unit 501

Invite tenders and select contractors

Level: 5

Credit value: 6

NDAQ number: R/601/2585

Unit aim

This unit is about handling the tendering process, identifying appropriate selection criteria to award the tender and agree a contractor.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand tendering procedures
- 2 Understand how to evaluate tenders
- 3 Understand principles for negotiating a contract
- 4 Be able to follow procedures for handling tenders
- 5 Be able to identify and select contractor(s)
- 6 Be able to negotiate and agree a contract

Guided learning hours

It is recommended that 32 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF111.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand tendering procedures

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of inviting a range of potential contractors to bid for a tender
- 1.2 Describe the procedures to be followed when inviting and receiving tenders

Outcome 2: Understand how to evaluate tenders

Assessment Criteria

The learner can:

- 2.1 Describe points to consider when evaluating tenders, their purpose and benefits
- 2.2 Describe purpose and benefits of identifying financial resources required
- 2.3 Describe the purpose and benefits of having objective selection criteria

Outcome 3: Understand principles for negotiating a contract

Assessment Criteria

The learner can:

- 3.1 Describe the purpose and benefits of agreeing a contract that is fit for purpose

Outcome 4: Be able to follow procedures for handling tenders

Assessment Criteria

The learner can:

- 4.1 Give information about the tendering process that is fit for purpose
- 4.2 Issue invitation to tender to potential suitably qualified contractors
- 4.3 Answer pre-tender queries to make sure all prospective suppliers have the same information
- 4.4 Follow procedures to receive, record and open tenders

Outcome 5: Be able to identify and select contractor(s)

Assessment Criteria

The learner can:

- 5.1 Evaluate tenders against criteria
- 5.2 Identify financial resources needed to achieve aims and objectives of the specification
- 5.3 Make selection in line with selection criteria
- 5.4 Inform unsuccessful tenderers of the outcome

5.5 Give feedback to unsuccessful tenderers, if required

Outcome 6: Be able to negotiate and agree a contract

Assessment Criteria

The learner can:

- 6.1 Negotiate with contractors to reach an agreement that
 - a) covers the requirements and specifications
 - b) offers good value for money
 - c) is acceptable to both parties
- 6.2 Negotiate with contractor(s) to make sure there is compliance with relevant organisational requirements, legislation and regulations
- 6.3 Make sure that specifications and contract are fit for purpose

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.3	
3.	3.1	
4.	4.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> •
	4.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> •
	4.3	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •
	4.4	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> •
	5.2 - 5.3	Evidence may be supplied via candidate reports/reflective accounts
	5.4 - 5.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:
6.	6.1 - 6.2	<ul style="list-style-type: none"> • • emails • memos • reports

Unit 502

Monitor and evaluate contracts

Level: 5

Credit value: 6

NDAQ number: Y/601/2586

Unit aim

This unit is about monitoring and evaluating a contractor's performance and compliance against the requirements of a contract.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand monitoring procedures
- 2 Understand how to evaluate contractor(s) performance
- 3 Be able to monitor the performance of contractors
- 4 Be able to evaluate the performance of contractor(s)

Guided learning hours

It is recommended that 35 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAF121.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand monitoring procedures**Assessment Criteria**

The learner can:

- 1.1 Describe ways of building relationships with contractor(s)
- 1.2 Explain the purpose and benefits of building relationships with contractor(s)
- 1.3 Describe different ways of monitoring compliance with a contract
- 1.4 Identify and evaluate different methods of monitoring contracts, that meet all needs
- 1.5 Describe ways of tracking achievement of contract objectives
- 1.6 Give examples of what constitutes a breach of contract
- 1.7 Identify ways of dealing with a breach of contract
- 1.8 Describe the legal, regulatory and organisational requirements governing contracts

Outcome 2: Understand how to evaluate contractor(s) performance**Assessment Criteria**

The learner can:

- 2.1 Identify and evaluate the sources and types of information that can be used to monitor contracts
- 2.2 Describe the purpose and benefits of evaluating and reporting on contractor(s) strengths and areas for improvement

Outcome 3: Be able to monitor the performance of contractors**Assessment Criteria**

The learner can:

- 3.1 Agree procedures for communicating with contractor(s)
- 3.2 Agree procedures for communicating with others involved
- 3.3 Agree procedures with contractors for monitoring performance
- 3.4 Check contractors compliance with the contract including, as required
 - a) legal and regulatory requirements
 - b) organisational requirements
- 3.5 Make sure contract objectives are being met
- 3.6 Agree action with contractor(s) to deal with non-compliance
- 3.7 Deal with breaches of contract(s) within agreed timescales, if required

Outcome 4: Be able to evaluate the performance of contractor(s)

Assessment Criteria

The learner can:

- 4.1 Agree procedures for evaluation
- 4.2 Agree sources of information for evaluation
- 4.3 Gather and analyse information
- 4.4 Identify and report on strengths of contractor(s)
- 4.5 Identify and report on areas for improvement for contractor(s)

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts,
2.	2.1 – 2.2	
3.	3.1 - 3.3 3.6 - 3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, case studies, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos •
	3.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • contracts •
	3.5	Evidence may be supplied via witness testimony, professional
4.	4.1 - 4.2	
	4.3	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> •
	4.4 - 4.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> •

Unit 503

Plan change across teams

Level: 5

Credit value: 6

NDAQ number: D/601/2587

Unit aim

This unit is about planning changes across a department or teams within a department, at the level of a department manager or director.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and benefits of planning change across teams
- 2 Understand the role of teams and individuals in planning change across teams
- 3 Understand the purpose and benefits of communication when planning change across teams
- 4 Understand the purpose and benefits of negotiation and dealing with problems when planning change across teams
- 5 Be able to identify and develop opportunities for change across teams
- 6 Be able to plan for change across teams

Guided learning hours

It is recommended that 26 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA115.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and benefits of planning change across teams

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of planning change across teams for organisations, individuals and teams

Outcome 2: Understand the role of teams and individuals in planning change across teams

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of engaging teams and individuals in planning change across teams
- 2.2 Evaluate the purpose and benefits of encouraging teams and individuals to feel that they are making contributions to planning change
- 2.3 Analyse the purpose and benefits of using teams and individuals to challenge ways of working constructively and creatively when planning change

Outcome 3: Understand the purpose and benefits of communication when planning change across teams

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and benefits of having a vision and goals for changes across teams and communicating them to those involved
- 3.2 Analyse the purpose and benefits of making sure team members and decision-makers are committed to planned changes

Outcome 4: Understand the purpose and benefits of negotiation and dealing with problems when planning change across teams

Assessment Criteria

The learner can:

- 4.1 Explain the purpose and benefits of being adaptable during change planning across teams
- 4.2 Explain the purpose and benefits of being able to renegotiate plans for changes across teams
- 4.3 Explain the types of problems and risks that may occur while planning change across teams

- 4.4 Explain ways of responding to problems while planning change across teams
- 4.5 Explain the purpose and benefits of dealing with problems when planning change across teams

Outcome 5: Be able to identify and develop opportunities for change across teams

Assessment Criteria

The learner can:

- 5.1 Recognise opportunities for change across teams
- 5.2 Evaluate options for change in terms of the constraints, risks, benefits, costs and implications across the teams involved
- 5.3 Evaluate the risks and benefits for the teams and the organisation associated with these options
- 5.4 Persuade teams and decision-makers to commit themselves to change

Outcome 6: Be able to plan for change across teams

Assessment Criteria

The learner can:

- 6.1 Encourage individuals and teams to challenge existing ways of working and put forward new ideas
- 6.2 Plan change across teams identifying vision, goals, objectives, timescales and resources
- 6.3 Agree plans for change with teams and decision-makers

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.2	
4.	4.1 – 4.5	
5.	5.1 - 5.3	Evidence may be supplied via candidate reports/reflective accounts
	5.4	Evidence may be supplied via witness testimony, professional

6.	6.1	discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
	6.3	
		<ul style="list-style-type: none">• letters• emails• memos• minutes of meetings• presentations•
	6.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">•

Unit 504

Implement, monitor and review change

Level: 5

Credit value: 6

NDAQ number: K/601/2589

Unit aim

This unit is about implementing change and evaluating the effects of change with all those involved in the change process.

Learning outcomes

There are **eight** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and benefits of implementing change
- 2 Understand the role of the team and individuals in implementing change
- 3 Understand the implications of implementing change
- 4 Understand the purpose and benefits of communication when implementing change
- 5 Understand the purpose and benefits of negotiation and dealing with problems when implementing change
- 6 Know how to monitor and review change and understand the purpose and benefits of doing so
- 7 Be able to implement change for a team
- 8 Be able to monitor and review change

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA116.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy December 2009.

Outcome 1: Understand the purpose and benefits of implementing change

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of implementing change for organisations, individuals and a team

Outcome 2: Understand the role of the team and individuals in implementing change

Assessment Criteria

The learner can:

- 2.1 Explain the purpose and benefits of engaging teams and individuals in implementing change
- 2.2 Explain the purpose and benefits of encouraging teams and individuals to feel that they are making contributions to implementing change
- 2.3 Evaluate the impact of implementing change on an organisation, the team and individuals
- 2.4 Explain how to manage the impact of implementing change to achieve a positive outcome

Outcome 3: Understand the implications of implementing change

Assessment Criteria

The learner can:

- 3.1 Explain how to evaluate options for implementing change
- 3.2 Explain and evaluate the constraints on implementing change
- 3.3 Analyse the implications of change on the organisation
- 3.4 Explain how to assess risks and benefits with those involved during the change process

Outcome 4: Understand the purpose and benefits of communication when implementing change

Assessment Criteria

The learner can:

- 4.1 Explain the purpose and benefits of communication with all involved when implementing change
- 4.2 Explain the purpose and benefits of making sure all those involved in change remain committed when implementing change

Outcome 5: Understand the purpose and benefits of negotiation and dealing with problems when implementing change

Assessment Criteria

The learner can:

- 5.1 Explain the purpose and benefits of being adaptable during a change process
- 5.2 Analyse the types of problems that may occur during the implementation of change
- 5.3 Explain ways of responding to problems during the implementation of change
- 5.4 Explain the purpose and benefits of dealing with problems during the implementation of change

Outcome 6: Know how to monitor and review change and understand the purpose and benefits of doing so

Assessment Criteria

The learner can:

- 6.1 Explain ways of monitoring and reviewing change
- 6.2 Explain the purpose and benefits of monitoring and reviewing change
- 6.3 Analyse ways of making use of the outcomes of reviewing
- 6.4 Explain the purpose and benefits of giving feedback to those who have been involved in the change process

Outcome 7: Be able to implement change for a team

Assessment Criteria

The learner can:

- 7.1 Communicate plans for change clearly and logically
- 7.2 Encourage team members to contribute to plans for change
- 7.3 Implement change with those involved in the change, providing information, support and motivation to those affected
- 7.4 Adapt and negotiate amendments to plans for change
- 7.5 Identify and solve, or refer problems, as required

Outcome 8: Be able to monitor and review change

Assessment Criteria

The learner can:

- 8.1 Monitor the effects of change with those involved in the change
- 8.2 Review the effects of change with those involved in the change
- 8.3 Provide feedback to those involved in change
- 8.4 Use feedback to agree further changes if required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1 – 3.4	
4.	4.1 – 4.2	
5.	5.1 – 5.4	
6.	6.1 – 6.4	
7.	7.1 – 7.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • presentation • minutes of meetings
8.	8.1 – 8.2	
	8.3 – 8.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • feedback given

Unit 505

Manage a project

Level: 5

Credit value: 10

NDAQ number: A/601/2578

Unit aim

This unit is about the managing the setting up and running of a project, by monitoring and reviewing the work of other people who are running the project, to achieve agreed aims and objectives.

Learning outcomes

There are **seven** learning outcomes to this unit.

The learner will:

- 1 Understand the nature and purpose of projects
- 2 Understand how to prepare and plan a project
- 3 Understand how to run a project
- 4 Understand purpose and benefits of evaluating a project and ways of evaluating projects
- 5 Be able to manage the preparation and planning of a project
- 6 Be able to manage a project
- 7 Be able to evaluate the outcomes of a project

Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA152.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the nature and purpose of projects**Assessment Criteria**

The learner can:

- 1.1 Compare and contrast the difference between managing operations and managing projects
- 1.2 Analyse the advantages and disadvantages of using projects, and when projects are appropriate

Outcome 2: Understand how to prepare and plan a project**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of establishing stakeholders involved in a project
- 2.2 Explain the purpose and benefits of defining a project's purpose, scope, timescale, costs, aims and objectives
- 2.3 Explain the purpose of agreeing a budget for a project
- 2.4 Analyse how to estimate types and quantity of resources needed to run a project
- 2.5 Explain the purpose and benefits of identifying project risks and developing contingency plans
- 2.6 Analyse how to define project limits
- 2.7 Analyse the advantages and disadvantages of different project planning methods for different types of project
- 2.8 Analyse the features of different tools that can be used to help with project planning and control
- 2.9 Explain how to establish the project team

Outcome 3: Understand how to run a project**Assessment Criteria**

The learner can:

- 3.1 Analyse how to monitor projects and the different methods that can be used
- 3.2 Explain the purpose and benefits of monitoring projects
- 3.3 Analyse how to establish a communication plan for a project
- 3.4 Explain the purpose and benefits of different methods of communication needed for managing a project
- 3.5 Analyse the features of different communication methods used to make sure a project runs smoothly
- 3.6 Explain the purpose and benefits of estimating and controlling resources during a project
- 3.7 Analyse the purpose of monitoring progress reporting during a project
- 3.8 Explain the purpose and benefits of achieving projects within agreed timescales

Outcome 4: Understand purpose and benefits of evaluating a project and ways of evaluating projects

Assessment Criteria

The learner can:

- 4.1 Analyse the purpose and benefits of evaluating projects
- 4.2 Analyse different ways of evaluating projects to make sure lessons are learned for the future

Outcome 5: Be able to manage the preparation and planning of a project

Assessment Criteria

The learner can:

- 5.1 Agree all stakeholders involved in a project
- 5.2 Confirm that the purpose of the project has been agreed with all relevant stakeholders
- 5.3 Confirm project scope, timescale, aims and objectives
- 5.4 Agree the preparation of a project specification
- 5.5 Confirm a budget for the project
- 5.6 Confirm all types of resources for a project
- 5.7 Agree the project plan and timed use of all types of resources
- 5.8 Agree identified risks and contingency plans developed
- 5.9 Sign off a project plan
- 5.10 Prepare a communication plan
- 5.11 Establish and select the project team

Outcome 6: Be able to manage a project

Assessment Criteria

The learner can:

- 6.1 Monitor a project
- 6.2 Give feedback to all those involved with or affected by a project
- 6.3 Make sure project plans are adapted to respond to unexpected events and risks
- 6.4 Give feedback on interim reports on project progress
- 6.5 Make sure a project achieves required outcomes on time and to budget

Outcome 7: Be able to evaluate the outcomes of a project

Assessment Criteria

The learner can:

- 7.1 Evaluate all project areas
- 7.2 Confirm the degree to which a project met its aims and objectives
- 7.3 Give feedback on project strengths and areas for improvement

Evidence requirements

Learning	Assessment	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective learner’s job role.
3.	3.1 – 3.8	
4.	4.1 – 4.2	
5.	5.1 – 5.11	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings • specification • budget • Critical path analysis • GANTT chart • contingency plan •
6.	6.1 – 6.5	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • adapted plans • feedback •
7.	7.1 – 7.3	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • reports •

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification.

Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework***
Contains general guidance about the Framework and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLLA assessments.

Appendix 2 Matrix of evidence triangulated across units within each of the NVQ levels

The following tables have been designed by the Council for Administration to show the accumulation of assessment evidence that has been generated for completion of either part of or the whole unit, which may be triangulated to other units at the same level.

There are no units for which assessment evidence can be triangulated outside the level of the unit for which assessment evidence has been generated.

The tables have been organised identifying the units against the competence categories in which they reside.

The horizontal line of unit numbers in the tables are the initial units from which assessment evidence may be generated. The vertical line of units identifies those units for which the assessment evidence generated by the units in the top horizontal line of units may be triangulated to. For example, at Level 1, unit 101 in 'Core Business and Administration' may generate assessment evidence which can be triangulated to units, 102, 103 or 106.

Level 1 units

CfA NOS category	Core Business and Administration					Communications		Customer Service	Document Production	Health and Safety	Manage Information and Data	
	101	102	103	105	106	104	107	108	109	112	110	111
4428 unit no.												
101		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
102	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
103	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
104								✓				
106	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
110												✓

Level 2 units

CFA NOS cate gory	Core Business and Administration																							Change				
	201	202	203	205	206	221	222	204	207	208	209	210	211	229	212	213	214	215	216	223	224	225	226	227	217	218	219	
4428 unit no.																												
201	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
202	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
203	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
205	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
206	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
211													✓															
217																											✓	
219																												✓
220																												✓
227	✓																											
229													✓															

Level 4 units

4482 unit no.	Services											Data						
	401	402	403	404	405	407	408	409	412	420	415	417	406	413	418	419	410	411
401		✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
402	✓		✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
403				✓			✓	✓	✓	✓			✓	✓	✓			
404																		
405																		
407					✓		✓	✓	✓	✓					✓	✓	✓	✓
408					✓	✓		✓	✓	✓					✓	✓		
409									✓	✓						✓		
410																		✓
411																	✓	
415												✓						
417											✓							
420									✓									

Level 5 units

CfA NOS category	Innovation and Change
	✓
✓	

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Useful contacts

Type	Contact	Query
UK learners	T: +44 (0) 844 543 0033 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44(0) 844 543 0000 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

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