

# Level 2 NVQ Award/Certificate/Diploma in Business and Administration (4428-02/92)



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November 2012  
Version 1.4 (Nov 2012)

## Qualification handbook for centres

|  |            |
|--|------------|
| Level 2 NVQ Award in Business and Administration       | 500/9466/X |
| Level 2 NVQ Certificate in Business and Administration | 500/9677/1 |
| Level 2 NVQ Diploma in Business and Administration     | 501/0040/3 |

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| Version and date | Change detail                                  | Section                             |
|------------------|--|-------------------------------------|
| 1.4 Nov 2012     | Additional units added to rules of combination | Qualification Structure<br>(Page 6) |

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## Introduction to the qualifications

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

| <b>Qualification title and level</b>                   | <b>City &amp; Guilds qualification number</b> | <b>Qualification accreditation number</b> | <b>Last registration date</b> | <b>Last certification date</b> |
|--|---|---|-------------------------------|--------------------------------|
| Level 2 NVQ Award in Business and Administration       | 4428-92                                       | 500/9466/X                                | 31/12/2013                    | 31/12/2015                     |
| Level 2 NVQ Certificate in Business and Administration | 4428-02 / 92                                  | 500/9677/1                                | 31/12/2013                    | 31/12/2015                     |
| Level 2 NVQ Diploma in Business and Administration     | 4428-92                                       | 501/0040/3                                | 31/12/2013                    | 31/12/2015                     |

The City & Guilds Level 2 NVQs in Business and Administration meet the needs of learners who wish to work or are already employed in, an administrative role. They provide the young or adult learner with a cohesive suite of qualifications that will enable them to develop a solid understanding of how to work and communicate in any business environment. These qualifications give them the opportunity to develop a broad skill set that will facilitate progression in the workplace and/or onto further learning and training. With the Level 2 NVQ Award they will gain recognition of skills in a wide range of everyday administrative tasks e.g. using diary systems, document production, supporting meetings whereas the Level 2 NVQ Certificate and Diploma allow them to develop knowledge and skills in more challenging activities such as event co-ordination and project support and the chance to pursue more specialist routes such as HR administration. With the inclusion of optional IT units e.g. using database and word processing software the learner can tailor their NVQ to suit their individual role and the needs of their employer.

These competence based qualifications replace the City & Guilds 4404 Level 2 NVQ in Business and Administration which expires on 31 July 2010. These qualifications are based on national occupation 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 e-Skills and the Institute of Customer Service (ICS).

Units achieved within the Level 2 Award can contribute towards the Level 2 NVQ Certificate and Diploma. The Level 2 NVQ Certificate is a component of the level 2 Apprenticeship in Business and Administration framework. The Level 2 NVQ Diploma is recognised as a proxy for the Level 2 NVQ Certificate within the framework.

### Contacting the Sector Skills Councils/Standards Setting Bodies

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ICS  
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Website: [www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)

## 1.1 Qualification structure

See overleaf for full details.

### **Level 2 NVQ Award in Business and Administration**

To achieve the Level 2 NVQ Award in Business and Administration learners must achieve:

- a minimum of 9 credits overall, of which a minimum of 6 credits must be at level 2
- 5 credits must be from the two mandatory units in Group A
- a minimum of 4 credits must be from optional units in Group B

### **Level 2 NVQ Certificate in Business and Administration**

To achieve the Level 2 NVQ Certificate in Business and Administration the learner must achieve:

- a minimum of 21 credits overall, of which a minimum of 14 credits must be at level 2
- 9 credits must be from the four mandatory units in Group A
- a minimum of 7 credits must be from optional units in Group B
- a maximum of 5 credits are allowed from optional units in Group C (this is not compulsory)

### **Level 2 NVQ Diploma in Business and Administration**

To achieve the Level 2 NVQ Diploma in Business and Administration the learner must achieve:

- a minimum of 37 credits overall, of which a minimum of 24 credits must be at level 2
- 9 credits must be from the four mandatory units in Group A
- a minimum of 17 credits must be from optional units in Group B
- a maximum of 11 credits are allowed from optional units in Group C (this is not compulsory)



## Key to table

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

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

| City & Guilds unit number | Ofqual unit Accreditation number | Unit title   | Level | Credit | GLH | Level 2 Award | Level 2 Certificate / Diploma | * Excluded combination |
|---------------------------|----------------------------------|--|-------|--------|-----|---------------|-------------------------------|------------------------|
| 107                       | KI/601/2446                      | Make and receive telephone calls                                   | 1     | 3      | 10  | <b>B</b>      | <b>B</b>                      |                        |
| 112                       | T/601/2465                       | Use occupational health and safety guidelines when using keyboards | 1     | 2      | 20  | <b>B</b>      | <b>C</b>                      |                        |
| 114                       | L/502/4627                       | Word processing software   | 1     | 3      | 20  |               | <b>C</b>                      | 242                    |
| 115                       | A/502/4395                       | Bespoke software   | 1     | 2      | 15  |               | <b>C</b>                      | 232                    |
| 116                       | F/502/4558                       | Data management software   | 1     | 2      | 15  |               | <b>C</b>                      | 233                    |
| 117                       | H/502/4553                       | Database software  | 1     | 3      | 20  |               | <b>C</b>                      | 234                    |
| 118                       | T/502/4153                       | Improving productivity using IT                                    | 1     | 3      | 20  |               | <b>C</b>                      | 235                    |
| 119                       | R/502/4256                       | IT security for users  | 1     | 1      | 10  |               | <b>C</b>                      | 236                    |
| 120                       | K/502/4621                       | Presentation software  | 1     | 3      | 20  |               | <b>C</b>                      | 237                    |
| 121                       | Y/502/4209                       | Set up an IT system  | 1     | 3      | 20  |               | <b>C</b>                      | 238                    |
| 122                       | A/502/4624                       | Spreadsheet software   | 1     | 3      | 20  |               | <b>C</b>                      | 239                    |
| 123                       | A/502/4378                       | Using collaborative technologies                                   | 1     | 3      | 20  |               | <b>C</b>                      | 240                    |
| 124                       | L/502/4630                       | Website software   | 1     | 3      | 20  |               | <b>C</b>                      | 241                    |
| 201                       | F/601/2467                       | Manage own performance in a business environment                   | 2     | 2      | 9   | <b>B</b>      | <b>A</b>                      |                        |
| 202                       | L/601/2469                       | Improve own performance in a business environment                  | 2     | 2      | 6   | <b>B</b>      | <b>A</b>                      |                        |
| 203                       | F/601/2470                       | Work in a business environment                                     | 2     | 2      | 18  | <b>A</b>      | <b>A</b>                      |                        |
| 204                       | D/601/2475                       | Communicate in a business environment                              | 2     | 3      | 18  | <b>A</b>      | <b>A</b>                      |                        |
| 205                       | L/601/2472                       | Solve business problems  | 2     | 4      | 12  | <b>B</b>      | <b>B</b>                      |                        |
| 206                       | Y/601/2474                       | Work with other people in a business environment                   | 2     | 3      | 10  | <b>B</b>      | <b>B</b>                      |                        |
| 207                       | H/601/2476                       | Use electronic message systems                                     | 2     | 1      | 6   | <b>B</b>      | <b>B</b>                      |                        |
| 208                       | KI/601/2477                      | Use a diary system   | 2     | 3      | 9   | <b>B</b>      | <b>B</b>                      |                        |
| 209                       | M/601/2478                       | Take minutes   | 2     | 4      | 15  | <b>B</b>      | <b>B</b>                      |                        |
| 210                       | T/601/2479                       | Handle mail  | 2     | 3      | 17  | <b>B</b>      | <b>B</b>                      |                        |
| 211                       | K/601/2480                       | Provide reception services   | 2     | 3      | 15  | <b>B</b>      | <b>B</b>                      | 229                    |
| 212                       | T/601/2482                       | Produce documents in a business environment                        | 2     | 4      | 15  | <b>B</b>      | <b>B</b>                      | 312                    |
| 213                       | A/601/2483                       | Prepare text from notes  | 2     | 3      | 15  | <b>B</b>      | <b>B</b>                      | 214, 313               |
| 214                       | F/601/2484                       | Prepare text from notes using touch typing (40 wpm)                | 2     | 3      | 15  | <b>B</b>      | <b>B</b>                      | 213, 313               |
| 215                       | J/601/2485                       | Prepare text from shorthand (60 wpm)                               | 2     | 8      | 55  | <b>B</b>      | <b>B</b>                      | 314                    |
| 216                       | L/601/2486                       | Prepare text from recorded audio instruction (40 wpm)              | 2     | 4      | 35  | <b>B</b>      | <b>B</b>                      | 315                    |
| 217                       | R/601/2487                       | Organise and report data   | 2     | 3      | 12  | <b>B</b>      | <b>B</b>                      |                        |
| 218                       | Y/601/2488                       | Research information   | 2     | 4      | 17  | <b>B</b>      | <b>B</b>                      |                        |
| 219                       | R/601/2490                       | Store and retrieve information                                     | 2     | 3      | 17  | <b>B</b>      | <b>B</b>                      |                        |
| 220                       | Y/601/2491                       | Archive information  | 2     | 2      | 13  | <b>B</b>      | <b>B</b>                      |                        |
| 221                       | H/601/2493                       | Use office equipment   | 2     | 4      | 18  | <b>B</b>      | <b>B</b>                      |                        |
| 222                       | M/601/2495                       | Maintain and issue stationery stock items                          | 2     | 3      | 14  | <b>B</b>      | <b>B</b>                      |                        |

| City & Guilds unit number | Ofqual unit Accreditation number | Unit title   | Level | Credit | GLH | Level 2 Award | Level 2 Certificate / Diploma | * Excluded combination |
|---------------------------|----------------------------------|--|-------|--------|-----|---------------|-------------------------------|------------------------|
| 223                       | L/601/2505                       | Support the organisation of an event                                 | 2     | 2      | 15  | <b>B</b>      | <b>B</b>                      | 320                    |
| 224                       | D/601/2508                       | Support the co-ordination of an event                                | 2     | 3      | 20  | <b>B</b>      | <b>B</b>                      | 321                    |
| 225                       | Y/601/2510                       | Support the organisation of business travel or accommodation         | 2     | 3      | 18  | <b>B</b>      | <b>B</b>                      |                        |
| 226                       | T/601/2515                       | Support the organisation of meetings                                 | 2     | 4      | 18  | <b>B</b>      | <b>B</b>                      | 322                    |
| 227                       | F/601/2517                       | Respond to change in a business environment                          | 2     | 3      | 16  | <b>B</b>      | <b>B</b>                      |                        |
| 228                       | J/601/2518                       | Support the management and development of an information system      | 2     | 7      | 40  | <b>B</b>      | <b>B</b>                      |                        |
| 229                       | Y/601/2457                       | Meet and welcome visitors  | 2     | 3      | 23  | <b>B</b>      | <b>B</b>                      | 211                    |
| 230                       | T/601/2790                       | Administer human resource records                                    | 2     | 3      | 20  |               | <b>B</b>                      |                        |
| 231                       | A/601/2791                       | Administer the recruitment and selection process                     | 2     | 4      | 30  |               | <b>B</b>                      |                        |
| 232                       | F/502/4396                       | Bespoke software   | 2     | 3      | 20  |               | <b>C</b>                      | 115                    |
| 233                       | J/502/4559                       | Data management software   | 2     | 3      | 20  |               | <b>C</b>                      | 116                    |
| 234                       | M/502/4555                       | Database software  | 2     | 4      | 30  |               | <b>C</b>                      | 117                    |
| 235                       | J/502/4156                       | Improving productivity using IT                                      | 2     | 4      | 30  |               | <b>C</b>                      | 118                    |
| 236                       | Y/502/4257                       | IT security for users  | 2     | 2      | 15  |               | <b>C</b>                      | 119                    |
| 237                       | M502/4622                        | Presentation software  | 2     | 4      | 30  |               | <b>C</b>                      | 120                    |
| 238                       | L/502/4210                       | Set up an IT system  | 2     | 4      | 30  |               | <b>C</b>                      | 121                    |
| 239                       | F/502/4625                       | Spreadsheet software   | 2     | 4      | 30  |               | <b>C</b>                      | 122                    |
| 240                       | F/502/4379                       | Using collaborative technologies                                     | 2     | 4      | 30  |               | <b>C</b>                      | 123                    |
| 241                       | R/502/4631                       | Website software   | 2     | 4      | 30  |               | <b>C</b>                      | 124                    |
| 242                       | R/502/4628                       | Word processing software   | 2     | 4      | 30  |               | <b>C</b>                      | 114                    |
| 243                       | J/601/2647                       | Administer parking dispensations                                     | 2     | 4      | 14  |               | <b>B</b>                      |                        |
| 310                       | M/601/2528                       | Develop a presentation   | 3     | 3      | 15  |               | <b>B</b>                      |                        |
| 311                       | T/601/2529                       | Deliver a presentation   | 3     | 3      | 15  |               | <b>B</b>                      |                        |
| 312                       | M/601/2531                       | Design and produce documents in a business environment               | 3     | 4      | 25  |               | <b>B</b>                      | 212                    |
| 313                       | T/601/2532                       | Prepare text from notes using touch typing (60 wpm)                  | 3     | 4      | 10  |               | <b>B</b>                      | 214                    |
| 314                       | A/601/2533                       | Prepare text from shorthand (80 wpm)                                 | 3     | 8      | 45  |               | <b>B</b>                      | 215                    |
| 315                       | F/601/2534                       | Prepare text from recorded audio instruction (60wpm)                 | 3     | 4      | 25  |               | <b>B</b>                      | 216                    |
| 316                       | L/601/2536                       | Support the design and development of an information system          | 3     | 7      | 35  |               | <b>B</b>                      |                        |
| 317                       | R/601/2537                       | Monitor information systems  | 3     | 7      | 30  |               | <b>B</b>                      |                        |
| 318                       | Y/601/2538                       | Analyse and report data  | 3     | 6      | 30  |               | <b>B</b>                      |                        |
| 319                       | D/601/2539                       | Order products and services  | 3     | 5      | 35  |               | <b>B</b>                      |                        |
| 320                       | R/601/2540                       | Plan and organise an event   | 3     | 4      | 28  |               | <b>B</b>                      | 223                    |
| 321                       | Y/601/2541                       | Co-ordinate an event   | 3     | 4      | 30  |               | <b>B</b>                      | 224                    |
| 322                       | D/601/2542                       | Plan and organise meetings   | 3     | 5      | 25  |               | <b>B</b>                      | 226                    |
| 326                       | A/601/2547                       | Contribute to innovation in a business environment                   | 3     | 4      | 30  |               | <b>B</b>                      |                        |
| 327                       | J/601/2549                       | Contribute to running a project                                      | 3     | 5      | 30  |               | <b>B</b>                      |                        |
| 328                       | A/601/2550                       | Deliver, monitor and evaluate customer service to internal customers | 3     | 3      | 12  |               | <b>B</b>                      |                        |
| 329                       | F/601/2551                       | Deliver, monitor and evaluate customer service to external customers | 3     | 3      | 12  |               | <b>B</b>                      |                        |

| City & Guilds unit number | Ofqual unit Accreditation number | Unit title  | Level | Credit | GLH | Level 2 Award | Level 2 Certificate / Diploma | * Excluded combination |
|---------------------------|----------------------------------|---|-------|--------|-----|---------------|-------------------------------|------------------------|
| 330                       | J/601/2552                       | Agree a budget  | 3     | 4      | 25  |               | <b>B</b>                      |                        |
| 113                       | J/502/4299                       | Using Email   | 1     | 2      | 15  |               | <b>C</b>                      | 254                    |
| 250                       | M/503/8617                       | Building working relationships with other from different countries and diverse cultures | 2     | 2      | 20  |               | <b>B</b>                      |                        |
| 251                       | Y/600/9011                       | Ensure your own actions reduce risks to health and safety                               | 2     | 4      | 30  |               | <b>C</b>                      |                        |
| 252                       | Y/600/8893                       | Payroll Processing  | 2     | 3      | 13  |               | <b>B</b>                      |                        |
| 253                       | F/601/8320                       | Processing customers' financial transactions  | 2     | 4      | 8   |               | <b>B</b>                      |                        |
| 254                       | M/502/4300                       | Using Email   | 2     | 3      | 20  |               | <b>C</b>                      | 113                    |
| 344                       | H/601/7791                       | Administer Legal Files  | 3     | 7      | 25  |               | <b>B</b>                      |                        |
| 345                       | K/601/7792                       | Build case files  | 3     | 4      | 20  |               | <b>B</b>                      |                        |
| 346                       | M/601/7793                       | Manage Case Files   | 3     | 5      | 25  |               | <b>B</b>                      |                        |
| 347                       | D/601/7787                       | Provide administrative support in schools   | 3     | 8      | 53  |               | <b>B</b>                      |                        |
| 348                       | L/601/2648                       | Administer parking and traffic challenges, representations and civil parking appeals    | 3     | 9      | 40  |               | <b>B</b>                      |                        |
| 349                       | R/601/2649                       | Administer statutory parking and traffic appeals  | 3     | 9      | 45  |               | <b>B</b>                      |                        |
| 350                       | J/601/2650                       | Administer parking and traffic debt recovery  | 3     | 9      | 54  |               | <b>B</b>                      |                        |
| 357                       | T/601/8282                       | Support Individuals With Specific Communication Needs                                   | 3     | 5      | 35  |               | <b>B</b>                      |                        |

## 1.2 Opportunities for progression

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

- Level 3 NVQ Certificate/Diploma in Business and Administration (4428-03/93)
- Level 3 NVQ Diploma in Customer Service (4430)
- Level 3 Certificate/Diploma for Legal Secretaries (7465)
- Level 3 Certificate in Medical Administration / Diploma for Medical Secretaries (4419)
- Level 3 Advanced Apprenticeship in Business and Administration (9050).

## 1.3 Qualification support materials

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

| Description           | How to access  |
|-----------------------|--|
| Promotional materials | <a href="http://www.cityandguilds.com">www.cityandguilds.com</a> |
| SmartScreen           | <a href="http://www.smartscreen.co.uk">www.smartscreen.co.uk</a> |

## 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 2 NVQ in Business and Administration will be given automatic approval for the new Level 2 NVQ Award/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.

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

**[www.e-skills.com](http://www.e-skills.com)**

**[www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)** (now under the CfA)

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 from the relevant sector skills council/standards 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 an 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 NVQ or competence-based qualification, '... may be based on either candidate performance at work or through simulation, as necessary'<sup>1</sup>.

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
- interruptions
- accountabilities
- office environment
- tools to do the job.

e.g. a candidate 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.

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<sup>1</sup> See, CfA Assessment Strategy 2009, Business & Administration NOS, December 2009.

## **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

- 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 from the relevant sector skills council/standards setting body.

## **Age restrictions**

These qualifications are approved for candidates aged 14 yrs or over.

## 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 qualifications 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 available on SmartScreen [www.smartscreen.co.uk](http://www.smartscreen.co.uk)
- Useful material is also available from the CfA [www.cfa.uk.com](http://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
- for imported ITQ units the City & Guilds 7574/7266 assignments are an acceptable alternative method of assessment.

City & Guilds provides the following assessments:

- Assignments and assignment guidance for imported ITQ units can be downloaded from the 7574 or 7266 qualification pages on [www.cityandguilds.com](http://www.cityandguilds.com)
- Sample assignments can also be downloaded from the 7574/7266 sections on SmartScreen.

### 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.
- Indicated time allowances must be followed if using the 7574/7266 assignments to assess the imported ITQ units.

### 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'<sup>2</sup>. (See also section 2.2 of this handbook p13).

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 & Administration NVQ unit.

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<sup>2</sup> See, CfA Assessment Strategy 2009, Business & Administration NOS, December 2009, clause 4.2.

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
- 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 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 (refer to 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 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](http://www.cityandguilds.com/eportfolios).**

**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 (RPL/A)**

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

RPL/RPA 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 RPL / RPA must be authentic, current, valid, relevant and sufficient.

Please refer to the relevant Assessment Strategy for guidance on RPL/RPA for imported units.

## 5 Units

### Availability of units

The Business and Administration units for these qualifications follow.

Imported units from IT, Customer Service and Management are available in the **4428 Imported Units document** from [www.cityandguilds.com](http://www.cityandguilds.com).

The learning outcomes and assessment criteria are also viewable on the National Database of Accredited Qualifications (NDAQ) **[www.accreditedqualifications.org.uk](http://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 (excluding specialist).

## Unit 107

## Make and receive telephone calls

**Level:** 1

**Credit value:** 3

**NDAQ number:** K/601/2446

### Unit aim

This unit is about making and receiving telephone calls, and transferring calls when necessary, in a business environment.

### Learning outcomes

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

The learner will:

- 1 Understand how to make telephone calls
- 2 Understand how to receive and transfer telephone calls
- 3 Be able to make telephone calls
- 4 Be able to receive telephone calls

### Guided learning hours

It is recommended that 10 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 BAA621.

### 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 make telephone calls****Assessment Criteria**

The learner can:

- 1.1 Describe the different features of telephone systems and how to use them
- 1.2 Give reasons for identifying the purpose of a call before making it
- 1.3 Describe different ways of obtaining the names and numbers of people that need to be contacted
- 1.4 Describe how to use a telephone system to make contact with people inside and outside an organisation
- 1.5 Explain the purpose of giving a positive image of self and own organisation
- 1.6 Explain the purpose of summarising the outcomes of a telephone conversation before ending the call
- 1.7 Describe how to identify problems and who to refer them to
- 1.8 Describe organisation structures and communication channels within an organisation
- 1.9 Describe how to follow organisational procedures when making a telephone call
- 1.10 Explain how to report telephone system faults

**Outcome 2: Understand how to receive and transfer telephone calls****Assessment Criteria**

The learner can:

- 2.1 Describe how to identify callers and their needs
- 2.2 Explain the purpose of giving accurate and up to date information to callers
- 2.3 Explain the purpose of confidentiality and security when dealing with callers
- 2.4 Describe the types of information that could affect confidentiality and security and how to handle these
- 2.5 Describe ways of identifying the appropriate person to whom a call is transferred
- 2.6 Describe the information to be given when transferring calls or leaving messages
- 2.7 Describe how to identify problems and who to refer them to
- 2.8 Describe how to follow organisational procedures when receiving a telephone call
- 2.9 Explain how to report telephone system faults

## Outcome 3: Be able to make telephone calls

### Assessment Criteria

The learner can:

- 3.1 Identify the purpose of the call
- 3.2 Obtain the name and number of the person to be contacted
- 3.3 Make contact with the person
- 3.4 Communicate information to achieve the purpose of the call
- 3.5 Project a positive image of self and organisation
- 3.6 Summarise the outcomes of the conversation before ending a call
- 3.7 Report telephone system faults, if necessary

## Outcome 4: Be able to receive telephone calls

### Assessment Criteria

The learner can:

- 4.1 Answer a phone following organisational procedures
- 4.2 Give a positive image of self and organisation
- 4.3 Identify the caller, where they are calling from, and what they need
- 4.4 Give accurate and up to date information whilst protecting confidentiality and security
- 4.5 Transfer calls, if required
- 4.6 Take and pass on messages according to the caller's needs
- 4.7 Summarise the outcomes of the conversation before ending the call
- 4.8 Report telephone system faults, if necessary

## Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 – 1.10          | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 2.9           |  |
| 3.                | 3.1 – 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"><li>• telephone logs</li></ul>  |
|                   | 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"><li>• memos</li><li>• emails</li><li>• telephone logs</li></ul> |

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4. 4.1 – 4.7 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:

- telephone logs
- messages

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4.8 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:

- memos
- emails
- telephone logs



## Unit 112

# Use occupational health and safety guidelines when using keyboards

**Level:** 1

**Credit value:** 2

**NDAQ number:** T/601/2465

### Unit aim

This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance.

### Learning outcomes

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

The learner will:

- 1 Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance
- 2 Be able to use occupational health and safety guidelines

### 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 BAE141.

### 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 occupational health and safety procedures when using keyboards and workstation care and maintenance****Assessment Criteria**

The learner can:

- 1.1 State occupational health and safety guidelines in relation to using keyboards
- 1.2 Explain the purpose of following occupational health and safety guidelines for using keyboards
- 1.3 Describe how to position fingers, wrists, forearms and back in relation to the equipment being used
- 1.4 Describe procedures for workstation care and maintenance

**Outcome 2: Be able to use occupational health and safety guidelines****Assessment Criteria**

The learner can:

- 2.1 Demonstrate correct positioning of fingers, wrists, forearms and back in relation to the equipment being used
- 2.2 Follow procedures for workstation care and maintenance
- 2.3 Follow occupational health and safety guidelines for using keyboards
- 2.4 Use techniques to prevent repetitive strain syndrome in accordance with occupational health and safety guidelines

**Evidence requirements**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>   |
|--------------------------|----------------------------|--|
| 1.                       | 1.1 – 1.4                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                       | 2.1 – 2.4                  | Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts |

## Unit 201

## Manage own performance in a business environment

**Level:** 2

**Credit value:** 2

**NDAQ number:** F/601/2467

### Unit aim

This unit is about managing and being accountable for your own work.

### Learning outcomes

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

The learner will:

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

### Guided learning hours

It is recommended that 9 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 BAA625.

### 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 plan work and be accountable to others****Assessment Criteria**

The learner can:

- 1.1 Outline guidelines, procedures codes of practice relevant to personal work
- 1.2 Explain the purpose of planning work, and being accountable to others for own work
- 1.3 Explain the purpose and benefits of agreeing realistic targets for work
- 1.4 Explain how to agree realistic targets
- 1.5 Describe ways of planning work to meet agreed deadlines
- 1.6 Explain the purpose of keeping other people informed about progress
- 1.7 Explain the purpose and benefits of letting other people know work plans need to be changed
- 1.8 Describe types of problems that may occur during work
- 1.9 Describe ways of seeking assistance with getting help to resolve problems
- 1.10 Explain the purpose and benefits of recognising and learning from mistakes

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

The learner can:

- 2.1 Explain the purpose and benefits of agreeing and setting high standards for own work
- 2.2 Describe ways of setting high standards for work
- 2.3 Explain the purpose and benefits of taking on new challenges if they arise
- 2.4 Explain the purpose and benefits of adapting to change
- 2.5 Explain the purpose and benefits of treating others with honesty, respect and consideration
- 2.6 Explain why own behaviour in the workplace is important
- 2.7 Describe types of behaviour at work that show honesty, respect and consideration and those that do not

**Outcome 3: Be able to plan and be responsible for own work, supported by others****Assessment Criteria**

The learner can:

- 3.1 Agree realistic targets and achievable timescales for own work
- 3.2 Plan work tasks to make best use of own time and available resources

- 3.3 Confirm effective working methods with others
- 3.4 Identify and report problems occurring in own work, using the support of other people when necessary
- 3.5 Keep other people informed of progress
- 3.6 Complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time
- 3.7 Take responsibility for own work and accept responsibility for any mistakes made
- 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 commitment to achieving these standards
- 4.2 Agree to take on new challenge(s) if they arise
- 4.3 Adapt to new ways of working
- 4.4 Treat other people with honesty, respect and consideration
- 4.5 Help and support other people in work tasks

### Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 - 1.10          | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 - 2.7           |  |
| 3.                | 3.1 – 3.5           | Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• minutes of meetings</li> <li>• to do lists</li> <li>• work diaries</li> <li>• action plans</li> </ul> |

|    |            |  |
|----|------------|--|
|    | 3.6        | <p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• to do lists</li> <li>• work diaries</li> <li>• action plans</li> </ul>   |
|    | 3.7        | <p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> </ul>  |
|    | 3.8        | <p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> </ul>  |
| 4. | 4.1<br>4.3 | <p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> </ul>  |
|    | 4.2        | <p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• minutes of meetings</li> <li>• to do lists</li> <li>• work diaries</li> <li>• action plans</li> </ul> |

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4.4 - 4.5

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

- letters
- emails
- memos
- messages
- minutes of meetings

## Unit 202

## Improve own performance in a business environment

**Level:** 2

**Credit value:** 2

**NDAQ number:** L/601/2469

### Unit aim

This unit is about identifying way of improving performance at work by encouraging feedback from others and maintaining a learning plan to record new learning and career opportunities.

### Learning outcomes

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

The learner will:

- 1 Understand how to improve own performance
- 2 Be able to improve own performance using feedback
- 3 Be able to agree own development needs using a learning plan

### Guided learning hours

It is recommended that 6 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 BAA625.

### 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 improve own performance****Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of continuously improving performance at work
- 1.2 Explain the purpose and benefits of encouraging and accepting feedback from others
- 1.3 Explain how learning and development can improve own work, benefit organisations, and identify career options
- 1.4 Describe possible career progression routes
- 1.5 Describe possible development opportunities

**Outcome 2: Be able to improve own performance using feedback****Assessment Criteria**

The learner can:

- 2.1 Encourage and accept feedback from other people
- 2.2 Use feedback to agree ways to improve own performance in the workplace
- 2.3 Complete work tasks, using feedback given, to improve performance

**Outcome 3: Be able to agree own development needs using a learning plan****Assessment Criteria**

The learner can:

- 3.1 Investigate and agree where further learning and development may improve own work performance
- 3.2 Confirm learning plan changes
- 3.3 Follow a learning plan
- 3.4 Review progress against learning plan and agree further learning updates, if required

**Evidence requirements**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 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 observation of workplace activities, witness testimony candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role   |
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>  |
|    | 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"> <li>• tasks completed</li> </ul>   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>  |
|    | 3.2<br>3.4 | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• learning plan</li> <li>• appraisal</li> <li>• performance reviews</li> </ul> |
|    | 3.3        | 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"> <li>• learning plan</li> </ul>   |

**Level:** 2

**Credit value:** 2

**NDAQ number:** F/601/2470

### Unit aim

This unit is about being able to behave, and make contributions to work tasks and procedures, in a business environment, in ways that support diversity, security and confidentiality at work, reduction of waste and improve efficiency.

### Learning outcomes

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

The learner will:

- 1 Understand how to respect other people at work
- 2 Understand how to maintain security and confidentiality at work and deal with concerns
- 3 Understand the purpose and procedures for keeping waste to a minimum in a business environment
- 4 Understand procedures for disposal of hazardous materials
- 5 Know how to support sustainability in an organisation
- 6 Be able to respect and support other people at work in an organisation
- 7 Be able to maintain security and confidentiality
- 8 Be able to support sustainability and minimise waste 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 BAF172.

### 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 respect other people at work****Assessment Criteria**

The learner can:

- 1.1 Describe what is meant by diversity and why it should be valued
- 1.2 Describe how to treat other people in a way that is sensitive to their needs
- 1.3 Describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs
- 1.4 Describe ways in which it is possible to learn from others at work

**Outcome 2: Understand how to maintain security and confidentiality at work and deal with concerns****Assessment Criteria**

The learner can:

- 2.1 Describe the purpose and benefits of maintaining security and confidentiality at work
- 2.2 Describe requirements for security and confidentiality in an organisation
- 2.3 Describe legal requirements for security and confidentiality, as required
- 2.4 Describe procedures for dealing with concerns about security and confidentiality in an organisation

**Outcome 3: Understand the purpose and procedures for keeping waste to a minimum in a business environment****Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of keeping waste to a minimum
- 3.2 Describe the main causes of waste that may occur in a business environment
- 3.3 Describe ways of keeping waste to a minimum
- 3.4 Identify ways of using technology to reduce waste
- 3.5 Outline the purpose and benefits of recycling
- 3.6 Describe organisational procedures for recycling materials

## **Outcome 4: Understand procedures for disposal of hazardous materials**

### **Assessment Criteria**

The learner can:

- 4.1 Describe the benefits of procedures for the recycling and disposal of hazardous materials
- 4.2 Describe organisational procedures for the recycling and disposal of hazardous materials

## **Outcome 5: Know how to support sustainability in an organisation**

### **Assessment Criteria**

The learner can:

- 5.1 Outline the purpose of improving efficiency and minimising waste
- 5.2 Describe ways of improving own working methods and use of technology to achieve efficiency and reduce waste

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

### **Assessment Criteria**

The learner can:

- 6.1 Complete work tasks alongside other people in a way that shows respect for
  - a) backgrounds
  - b) abilities
  - c) values, customs and beliefs
- 6.2 Complete work tasks with other people in a way that is sensitive to their needs
- 6.3 Use feedback and guidance from other people to improve own way of working
- 6.4 Follow organisational procedures and legal requirements in relation to discrimination legislation, as required

## **Outcome 7: Be able to maintain security and confidentiality**

### **Assessment Criteria**

The learner can:

- 7.1 Keep property secure, following organisational procedures and legal requirements, as required
- 7.2 Keep information secure and confidential, following organisational procedures and legal requirements
- 7.3 Follow organisational procedures to report concerns about security / confidentiality, as required

## Outcome 8: Be able to support sustainability and minimise waste in an organisation

### Assessment Criteria

The learner can:

- 8.1 Complete work tasks, keeping waste to a minimum
- 8.2 Use technology in work task(s) in ways that minimise waste
- 8.3 Follow procedures for recycling and disposal of hazardous materials, as required
- 8.4 Follow procedures for the maintenance of equipment in own work

### 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 – 2.4           |  |
| 3.                | 3.1 – 3.6           |  |
| 4.                | 4.1 – 4.2           |  |
| 5.                | 5.1 – 5.2           |  |
| 6.                | 6.1 - 6.2<br>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   |
|                   | 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"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> <li>• appraisals</li> <li>• performance reviews</li> </ul> |
| 7.                | 7.1 - 7.3           | 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   |
| 8.                | 8.1 - 8.4           |  |

**Level:** 2

**Credit value:** 3

**NDAQ number:** D/601/2475

### Unit aim

This unit is about being able to communicate clearly and accurately, in writing and verbally, with other people in a business environment.

### 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 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 developing communication skills

### 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 BAA614.

### 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 reasons for knowing the purpose of communication
- 1.2 Explain reasons for knowing the audience to whom the communication is being presented
- 1.3 Describe different methods of communication
- 1.4 Describe when to use different methods of communication

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

The learner can:

- 2.1 Identify different sources of information that may be used when preparing written communication
- 2.2 Describe the communication principles for using electronic forms of written communication in a business environment
- 2.3 Describe the reasons for using language that suits the purpose of written communication
- 2.4 Describe ways of organising, structuring and presenting written information so it meets the needs of an audience
- 2.5 Describe ways of checking for the accuracy of written information
- 2.6 Explain the purpose of accurate use of grammar, punctuation and spelling
- 2.7 Explain what is meant by plain English, and why it is used
- 2.8 Explain the need to proofread and check written work
- 2.9 Explain how to identify work that is important and work that is urgent
- 2.10 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 clearly
- 3.2 Explain ways of making contributions to discussions that help to move them forward
- 3.3 Describe methods of active listening
- 3.4 Explain the purpose of summarising verbal communications



## **Outcome 4: Understand the purpose of feedback in developing communication skills**

### **Assessment Criteria**

The learner can:

- 4.1 Describe ways of getting feedback on communications
- 4.2 Explain the purpose of using feedback to develop communication skills

## **Outcome 5: Be able to plan communication**

### **Assessment Criteria**

The learner can:

- 5.1 Identify the purpose of communications and the audience(s)
- 5.2 Select methods of communication to be used
- 5.3 Confirm methods of communication, as required

## **Outcome 6: Be able to communicate in writing**

### **Assessment Criteria**

The learner can:

- 6.1 Find and select information needed for written communications
- 6.2 Organise, structure and present information so that it is clear, accurate and meets the needs of the audience
- 6.3 Use language that suits the purpose of written communication and the audience
- 6.4 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear
- 6.5 Proofread and check written communications and make amendments, as required
- 6.6 Confirm what is important and what is urgent
- 6.7 Produce written communications to meet agreed deadlines
- 6.8 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 clearly and accurately
- 7.2 Make contributions to discussion(s) that move the discussion forward
- 7.3 Actively listen to information given by other people, and make relevant responses
- 7.4 Ask relevant questions to clarify own understanding, as required
- 7.5 Summarise verbal communication(s) and agree that the correct meaning has been understood

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

### Assessment Criteria

The learner can:

- 8.1 Get feedback to confirm whether the communication has achieved its purpose
- 8.2 Use feedback to identify and agree ways of improving own communication skills

### 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 – 2.10             |  |
| 3.                | 3.1 – 3.4              |  |
| 4.                | 4.1 – 4.2              |  |
| 5.                | 5.1 – 5.3              |  |
| 6.                | 6.1                    | 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"> <li>• information selected</li> </ul>   |
|                   | 6.2 – 6.5<br>6.7 - 6.8 | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• information formatted</li> </ul> |
|                   | 6.6                    | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 7.                | 7.1                    | 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"> <li>• presentation</li> </ul>  |
|                   | 7.2<br>7.4 – 7.5       | 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"> <li>• minutes of meetings</li> </ul>   |

|    |     |   |
|----|-----|---|
|    | 7.3 | 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  |
| 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"> <li>• feedback received</li> </ul> |
|    | 8.2 | Evidence may be supplied via candidate reports/reflective accounts  |

**Level:** 2

**Credit value:** 4

**NDAQ number:** L/601/2472

### Unit aim

This unit is about recognising that there is a problem with the way work is being carried out in a business environment and working with other people to agree a solution.

### Learning outcomes

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

The learner will:

- 1 Know how to recognise business problems and their causes
- 2 Understand techniques for solving business problems
- 3 Know how to review approaches and solutions to business problems
- 4 Be able to recognise business problems
- 5 Be able to plan and carry out a solution to a business problem
- 6 Be able to review a solution to the business problem

### 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 BAG126.

### 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: Know how to recognise business problems and their causes****Assessment Criteria**

The learner can:

- 1.1 Outline ways of recognising when a business problem exists
- 1.2 Describe how to identify possible causes of business problems

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

The learner can:

- 2.1 Describe different ways of solving a business problem
- 2.2 Outline different ways of planning to solve a business problem
- 2.3 Give reasons for having support and feedback from others when solving the business problem
- 2.4 Explain the purpose of checking progress and adjusting approaches to solving a business problem
- 2.5 Describe ways of recognising when a business problem has been solved

**Outcome 3: Know how to review approaches and solutions to business problems****Assessment Criteria**

The learner can:

- 3.1 Outline ways of reviewing approaches to solving business problems
- 3.2 Outline ways of reviewing the effectiveness of solutions to business problems

**Outcome 4: Be able to recognise business problems****Assessment Criteria**

The learner can:

- 4.1 Identify a business problem
- 4.2 Confirm own understanding of a business problem
- 4.3 Work with others to agree what the business problem is

## Outcome 5: Be able to plan and carry out a solution to a business problem

### Assessment Criteria

The learner can:

- 5.1 Agree an approach for how to solve the business problem
- 5.2 Develop a plan to solve the business problem
- 5.3 Identify ways of deciding that the business problem has been solved
- 5.4 Agree approaches to solving the business problem, with others as required
- 5.5 Carry out a plan to solve the business problem, involving others as required
- 5.6 Use support and feedback from others to reach a solution
- 5.7 Check progress towards solving the business problem
- 5.8 Use feedback and progress reports to adjust the plan, as required
- 5.9 Confirm that the business problem has been solved, with others as required

## Outcome 6: Be able to review a solution to the business problem

### Assessment Criteria

The learner can:

- 6.1 Review an approach to solving a business problem for its effectiveness
- 6.2 Review a solution to the business problem for its effectiveness
- 6.3 Identify alternative approaches and solutions for possible effectiveness

## 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 – 2.5           |   |
| 3.                | 3.1 - 3.2           |   |
| 4.                | 4.1 - 4.2           | Evidence may be supplied via candidate reports/reflective accounts  |
|                   | 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"><li>• minutes of meetings</li><li>• memos</li><li>• emails</li></ul> |
| 5.                | 5.1 - 5.3           | Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts  |

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|    |           |  |
|----|-----------|--|
|    | 5.4 - 5.9 | <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"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> </ul> |
| 6. | 6.1 - 6.3 | <p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts</p>  |

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## Unit 206

# Work with other people in a business environment

**Level:** 2

**Credit value:** 3

**NDAQ number:** Y/601/2474

### Unit aim

This unit is about working within a team, sharing responsibility with others to make sure that a team can achieve agreed goals and objectives.

### Learning outcomes

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

The learner will:

- 1 Understand how your role fits with organisational values and practices
- 2 Understand how to work as part of a team to achieve goals and objectives
- 3 Understand how to communicate as part of a team
- 4 Understand the contribution of individuals within a team
- 5 Understand how to deal with problems and disagreements
- 6 Understand the purpose of feedback when working as a team
- 7 Be able to work in a way that fits with organisational values and practices
- 8 Be able to work in a team to achieve goals and objectives
- 9 Be able to deal with or refer problems in a team
- 10 Be able to use feedback on objectives in a team

### Guided learning hours

It is recommended that 10 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 BAG1210.

### 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 your role fits with organisational values and practices

#### Assessment Criteria

The learner can:

- 1.1 Describe the sector in which your organisation operates
- 1.2 Describe your organisation's missions and purpose
- 1.3 Compare your organisation to other types of organisation in your sector
- 1.4 Outline your responsibilities
- 1.5 Describe how your role fits into your organisation's structure
- 1.6 Describe how your role contributes to the organisation's operations
- 1.7 Outline the policies, procedures, systems and values of your organisation that are relevant to your role
- 1.8 Outline who you would consult if unsure about organisational policies, procedures, systems and values

### Outcome 2: Understand how to work as part of a team to achieve goals and objectives

#### Assessment Criteria

The learner can:

- 2.1 Explain the purpose of working with other people to achieve goals and objectives
- 2.2 Identify situations in which working with others can achieve positive results
- 2.3 Explain the purpose and benefits of agreeing work goals and plans when working with others
- 2.4 Describe situations in which team members might support each other
- 2.5 Describe ways of providing support to other people in a team
- 2.6 Explain the purpose of agreeing quality measures with a team

### Outcome 3: Understand how to communicate as part of a team

#### Assessment Criteria

The learner can:

- 3.1 Explain the purpose of communicating with other people in a team
- 3.2 Identify different methods of communication and when to use them

## **Outcome 4: Understand the contribution of individuals within a team**

### **Assessment Criteria**

The learner can:

- 4.1 Explain the purpose of recognising the strengths of others
- 4.2 Explain the value of diversity within teams
- 4.3 Explain the purpose of respecting individuals working within a team

## **Outcome 5: Understand how to deal with problems and disagreements**

### **Assessment Criteria**

The learner can:

- 5.1 Describe the types of problems and disagreements that may occur when working with other people in a team
- 5.2 Describe ways of dealing with problems and disagreements when working with other people in a team

## **Outcome 6: Understand the purpose of feedback when working as a team**

### **Assessment Criteria**

The learner can:

- 6.1 Explain the purpose of giving and receiving constructive feedback
- 6.2 Describe ways of using feedback to improve own work, and a team as a whole

## **Outcome 7: Be able to work in a way that fits with organisational values and practices**

### **Assessment Criteria**

The learner can:

- 7.1 Follow organisational policies, systems and procedures relevant to your role
- 7.2 Apply relevant organisational values across all aspects of your work
- 7.3 Work with outside organisations and individuals in a way that protects the image of your organisation, when relevant
- 7.4 Seek guidance when unsure about organisational policies, systems, procedures and values

## **Outcome 8: Be able to work in a team to achieve goals and objectives**

### **Assessment Criteria**

The learner can:

- 8.1 Communicate effectively with other people in a team
- 8.2 Contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome
- 8.3 Make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team
- 8.4 Provide support to members of a team, if required

- 8.5 Show respect for individuals in a team
- 8.6 Make sure own work meets agreed quality standards and is on time

### **Outcome 9: Be able to deal with or refer problems in a team**

#### **Assessment Criteria**

The learner can:

- 9.1 Identify problem(s) or disagreement(s) in a team
- 9.2 Resolve problem(s) or disagreement(s) within limits of own authority and experience
- 9.3 Refer problems, as required

### **Outcome 10: Be able to use feedback on objectives in a team**

#### **Assessment Criteria**

The learner can:

- 10.1 Contribute to providing constructive feedback on the achievement of objectives to a team
- 10.2 Receive constructive feedback on own work
- 10.3 Use feedback on achievement of objectives to identify improvements in own work

### **Evidence requirements**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>   |
|--------------------------|----------------------------|--|
| 1.                       | 1.1 - 1.8                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                       | 2.1 – 2.6                  |  |
| 3.                       | 3.1 - 3.2                  |  |
| 4.                       | 4.1 - 4.3                  |  |
| 5.                       | 5.1 - 5.2                  |  |
| 6.                       | 6.1 - 6.2                  |  |
| 7.                       | 7.1 – 7.2                  | 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 |

|     |             |  |
|-----|-------------|--|
|     | 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: |
| 8.  | 8.1 – 8.4   | <ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• letters</li> <li>• emails</li> </ul>  |
|     | 8.5 – 8.6   | 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                             |
| 9.  | 9.1 - 9.3   | 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: |
| 10. | 10.1        | <ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> </ul>   |
|     | 10.2 - 10.3 | 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"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> <li>• appraisals</li> <li>• performance reviews</li> </ul>  |

**Level:** 2

**Credit value:** 1

**NDAQ number:** H/601/2476

### **Unit aim**

This unit is about organising and updating messages using an electronic message system.

### **Learning outcomes**

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

The learner will:

- 1 Understand the use of electronic message systems
- 2 Be able to use electronic message systems

### **Guided learning hours**

It is recommended that 6 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 BAA622.

### **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 use of electronic message systems

### Assessment Criteria

The learner can:

- 1.1 Describe the main types of electronic message systems
- 1.2 Describe the different features of electronic message systems
- 1.3 Explain the purpose of keeping an electronic message system up to date
- 1.4 Describe how to use an electronic message system to check and delete or discard messages
- 1.5 Explain the purpose of leaving clear messages for others

## Outcome 2: Be able to use electronic message systems

### Assessment Criteria

The learner can:

- 2.1 Keep a message system up to date
- 2.2 Check system for messages
- 2.3 Respond to messages within agreed timescales
- 2.4 Delete messages when dealt with
- 2.5 Select the information to be given when taking or leaving messages
- 2.6 Leave messages on other people's systems, if required

## Evidence requirements

| Learning Outcomes | Assessment Criteria | 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 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  |
|                   | 2.5 – 2.6           | 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"> <li>• messages</li> </ul> |

## Unit 208

## Use a diary system

**Level:** 2

**Credit value:** 3

**NDAQ number:** K/601/2477

### Unit aim

This unit is about using a diary system to organise and record work activities so that planned work can take place.

### Learning outcomes

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

The learner will:

- 1 Understand a diary system
- 2 Understand how to use a diary system
- 3 Be able to use a diary system

### Guided learning hours

It is recommended that 9 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 BAA431.

### 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 a diary system

#### Assessment Criteria

The learner can:

- 1.1 Explain the purpose of using a diary system
- 1.2 Describe different types of diary systems
- 1.3 Describe the purpose of obtaining relevant information about requested diary entries and changes

### Outcome 2: Understand how to use a diary system

#### Assessment Criteria

The learner can:

- 2.1 Describe the types of information needed for diary entries
- 2.2 Explain how to prioritise requests
- 2.3 Explain the purpose of prioritising requests
- 2.4 Explain the purpose of trying to balance the needs of all those involved
- 2.5 Explain the purpose of communicating changes to those affected
- 2.6 Explain the purpose of keeping a diary system up to date
- 2.7 Describe the different types of problems that may occur when new requests are made and solutions to these problems
- 2.8 Explain the purpose of following security and confidentiality procedures when using a diary system

### Outcome 3: Be able to use a diary system

#### Assessment Criteria

The learner can:

- 3.1 Obtain information needed to make diary entries
- 3.2 Make diary entries accurately and clearly
- 3.3 Prioritise changes to entries, as required
- 3.4 Record agreed changes in the diary
- 3.5 Identify and report the effects of any changes for existing entries
- 3.6 Solve problems by negotiating alternative arrangements, when necessary
- 3.7 Keep a diary up to date and store it securely



## Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 – 1.3           | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 2.8           |  |
| 3.                | 3.1                 | Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 3.2<br>3.4 - 3.7    | Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• diary</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>   |
|                   | 3.3                 | 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"> <li>• diary</li> </ul>   |

**Level:** 2

**Credit value:** 4

**NDAQ number:** M/601/2478

### **Unit aim**

This unit is about taking minutes at different kinds of meetings, where an accurate record is needed of decisions made and actions agreed.

### **Learning outcomes**

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

The learner will:

- 1 Understand the task of taking minutes at meetings
- 2 Understand the role of the chair and other formal responsibilities in meetings
- 3 Know how to take minutes at meetings
- 4 Be able to prepare for taking minutes
- 5 Be able to minute meetings

### **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 BAA441.

### **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 task of taking minutes at meetings****Assessment Criteria**

The learner can:

- 1.1 Describe the purpose of meetings
- 1.2 Describe legal and organisational requirements that may apply to minute taking
- 1.3 Explain the purpose of minutes as an accurate record of discussions and decisions
- 1.4 Describe the purpose of documents and terms that are commonly used in meetings

**Outcome 2: Understand the role of the chair and other formal responsibilities in meetings****Assessment Criteria**

The learner can:

- 2.1 Explain the role of the chair and other formal responsibilities within meetings
- 2.2 Describe how to work in partnership with the chair when taking minutes

**Outcome 3: Know how to take minutes at meetings****Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of listening actively when taking minutes
- 3.2 Explain how to listen actively when minute taking
- 3.3 Describe how to take notes during discussions held at meetings
- 3.4 Explain the purpose of getting clarification
- 3.5 Describe how to get clarification
- 3.6 Describe different types of minutes and their purpose
- 3.7 Describe the different styles of writing that may be used in minute taking
- 3.8 Explain how to sort, select and structure information to produce minutes
- 3.9 Explain what is meant by using the correct tone and professional language in minutes

**Outcome 4: Be able to prepare for taking minutes****Assessment Criteria**

The learner can:

- 4.1 Prepare for taking minutes, as required
- 4.2 Communicate with the meeting chair, as required
- 4.3 Note any changes to the agenda, matters arising and action points from last meeting

## Outcome 5: Be able to minute meetings

### Assessment Criteria

The learner can:

- 5.1 Take notes at a meeting of all items required
- 5.2 Produce accurate minutes that record the meaning of discussions and decisions taken
- 5.3 Make sure minutes are in the agreed style
- 5.4 Make sure the process for signing off minutes and / or action points has been agreed
- 5.5 Check minutes and make necessary amendments
- 5.6 Agree minutes with the relevant people and circulate them within the agreed timescales
- 5.7 Follow organisational requirements for confidentiality and security of information, as required
- 5.8 Make sure follow-up actions, and who is responsible for taking the actions, have been clearly identified
- 5.9 Store notes and minutes following organisational procedures
- 5.10 Follow legal and organisational requirements for minute taking, as necessary

### 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 – 2.2           |   |
| 3.                | 3.1 – 3.9           |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>     |
|                   | 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"> <li>• agenda</li> </ul>  |
| 5.                | 5.1 – 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"> <li>• notes of meeting</li> <li>• minutes of meeting</li> </ul> |

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|             |  |
|-------------|--|
| 5.4 – 5.7   | 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"><li>• minutes of meetings</li></ul>  |
| 5.8<br>5.10 | 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"><li>• letters</li><li>• emails</li><li>• memos</li><li>• minutes</li></ul> |
| 5.9         | Evidence may be supplied via witness testimony and candidate reports/reflective accounts   |

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## Unit 210

## Handle mail

**Level:** 2

**Credit value:** 3

**NDAQ number:** T/601/2479

### Unit aim

This unit is about handling internal and external mail and packages within the service requirements of an organisation.

### Learning outcomes

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

The learner will:

- 1 Understand security procedures when handling mail or packages
- 2 Understand the range of available internal and external mail services
- 3 Be able to receive, distribute and collect internal mail or packages
- 4 Be able to follow procedures for despatching mail or packages
- 5 Be able to resolve, report or refer problems that may occur in handling mail or packages

### Guided learning hours

It is recommended that 17 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 BAA612.

### 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 security procedures when handling mail or packages**

#### **Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of security procedures for handling mail or packages
- 1.2 Give examples of security procedures for handling mail in organisation(s)

### **Outcome 2: Understand the range of available internal and external mail services**

#### **Assessment Criteria**

The learner can:

- 2.1 Explain the purpose of distributing and dispatching mail to the correct recipient within agreed timescales
- 2.2 State the organisational structure and names, roles and locations of individuals and teams
- 2.3 Give examples of internal and external mail services available to organisations
- 2.4 Give reasons for selecting internal and external mail services
- 2.5 Describe the methods of calculating postage charges for mail or packages
- 2.6 Describe the types of problems that may occur with incoming and outgoing mail and how to deal with these

### **Outcome 3: Be able to receive, distribute and collect internal mail or packages**

#### **Assessment Criteria**

The learner can:

- 3.1 Receive, check and sort incoming mail or packages
- 3.2 Identify and deal with unwanted junk mail or damaged items
- 3.3 Identify and deal with suspicious items
- 3.4 Distribute incoming mail or packages
- 3.5 Collect, sort and prioritise outgoing mail or packages

### **Outcome 4: Be able to follow procedures for despatching mail or packages**

#### **Assessment Criteria**

The learner can:

- 4.1 Identify best options for despatching mail
- 4.2 Agree a cost for despatching mail or packages

- 4.3 Arrange services to collect outgoing mail or packages, if required
- 4.4 Identify and prepare items for urgent or special delivery, where necessary
- 4.5 Calculate correct postage charges for outgoing mail or packages
- 4.6 Record postage costs
- 4.7 Despatch outgoing mail or packages to agreed timescale

## Outcome 5: Be able to resolve, report or refer problems that may occur in handling mail or packages

### Assessment Criteria

The learner can:

- 5.1 Identify where a problem may exist with incoming and outgoing mail or packages
- 5.2 Resolve, report or refer problems with incoming and outgoing mail or packages

### 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 – 2.6           |  |
| 3.                | 3.1 – 3.3<br>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"> <li>• mail records</li> <li>• log book – special deliveries</li> </ul> |
|                   | 3.4                 | 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   |
| 4.                | 4.1 – 4.7           | 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"> <li>• mail records</li> <li>• log book – special deliveries</li> </ul> |
| 5.                | 5.1                 | 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   |



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5.2

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:

- mail records
- log book – special deliveries

## Unit 211

## Provide reception services

**Level:** 2

**Credit value:** 3

**NDAQ number:** K/601/2480

### Unit aim

This unit is about providing a reception service in a business environment, acting as the first point of contact between a business, its clients and the public.

### Learning outcomes

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

The learner will:

- 1 Understand the purpose of reception services in a business environment
- 2 Understand the procedures to be followed when providing reception services
- 3 Understand ways of improving reception services and developing own role
- 4 Provide a reception service

### 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 BAC312.

### 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 reception services in a business environment****Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of the receptionist role as the first point of contact between the public / client and an organisation
- 1.2 Explain the purpose of presenting a positive image of self and the organisation
- 1.3 Explain how to present a positive image of self and the organisation

**Outcome 2: Understand the procedures to be followed when providing reception services****Assessment Criteria**

The learner can:

- 2.1 Describe the structure and lines of communication in an organisation
- 2.2 Explain how the structure in an organisation affects lines of communication
- 2.3 Explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities
- 2.4 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area
- 2.5 Explain the purpose of health and safety procedures when providing a reception service, including own responsibilities
- 2.6 Explain how to carry out health and safety procedures in a reception area
- 2.7 Describe the emergency procedures and your role within them
- 2.8 Describe the types of problems that may occur with visitors including, conflict and aggression
- 2.9 Explain ways of dealing with problems and when to refer them to an appropriate colleague

**Outcome 3: Understand ways of improving reception services and developing own role****Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of suggesting ideas for improving a reception area
- 3.2 Explain the purpose of carrying out additional duties, if applicable, and give examples

## Outcome 4: Provide a reception service

### Assessment Criteria

The learner can:

- 4.1 Present a positive image of self and the organisation
- 4.2 Provide individuals with requested information and other useful information, within guidelines on confidentiality
- 4.3 Follow entry and exit security procedures, if required
- 4.4 Follow relevant health and safety procedures
- 4.5 Deal with problems that may occur, if necessary
- 4.6 Refer problems, as required
- 4.7 Make sure a reception area gives a positive image of the organisation
- 4.8 Make suggestions for improving a reception area, as required
- 4.9 Follow organisational procedures in the event of an accident or emergency, as required
- 4.10 Look for and complete additional task(s) during quiet periods, as required

### Evidence requirements

| Learning Outcomes | Assessment Criteria            | Assessment guidance   |
|-------------------|--------------------------------|---|
| 1.                | 1.1 – 1.3                      | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1 – 2.9                      |   |
| 3.                | 3.1 – 3.2                      |   |
| 4.                | 4.1 – 4.5<br>4.7<br>4.9 – 4.10 | 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  |
|                   | 4.6<br>4.8                     | 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"><li>• letters</li><li>• emails</li><li>• memos</li></ul> |

## Unit 212

## Produce documents in a business environment

**Level:** 2

**Credit value:** 4

**NDAQ number:** T/601/2482

### Unit aim

This unit is about preparing high quality and attractive documents to agreed layouts, formats, styles to meet agreed deadlines.

### Learning outcomes

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

The learner will:

- 1 Understand the purpose of producing high quality and attractive documents in a business environment
- 2 Know the resources and technology available and how to use them when producing documents in a business environment
- 3 Understand the purpose of following procedures when producing documents in a business environment
- 4 Be able to prepare for tasks
- 5 Be able to produce documents to agreed specifications

### 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 BAA211.

### 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 producing high quality and attractive documents in a business environment**

#### **Assessment Criteria**

The learner can:

- 1.1 Outline different types of documents that may be produced and the different styles that could be used
- 1.2 Describe different formats in which text may be presented
- 1.3 Explain the purpose and benefits of producing high quality and attractive documents

### **Outcome 2: Know the resources and technology available and how to use them when producing documents in a business environment**

#### **Assessment Criteria**

The learner can:

- 2.1 Describe the types of resources available for producing high quality and attractive documents
- 2.2 Outline ways of using different resources to produce documents
- 2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features

### **Outcome 3: Understand the purpose of following procedures when producing documents in a business environment**

#### **Assessment Criteria**

The learner can:

- 3.1 Explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents
- 3.2 Outline different ways of organising content needed for documents
- 3.3 Outline ways of integrating and laying out text and non-text
- 3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 3.5 Explain the purpose of storing documents safely and securely, and ways of doing so
- 3.6 Explain the purpose of confidentiality and data protection when preparing documents
- 3.7 Explain the purpose and benefits of meeting deadlines

## Outcome 4: Be able to prepare for tasks

### Assessment Criteria

The learner can:

- 4.1 Confirm the purpose, content, style and deadlines for documents

## Outcome 5: Be able to produce documents to agreed specifications

### Assessment Criteria

The learner can:

- 5.1 Prepare resources needed to produce documents
- 5.2 Organise the content required to produce documents
- 5.3 Make use of technology, as required
- 5.4 Format and produce documents to an agreed style
- 5.5 Integrate non-text objects into an agreed layout, if required
- 5.6 Check texts for accuracy
- 5.7 Edit and correct texts, as required
- 5.8 Clarify document requirements, when necessary
- 5.9 Store documents safely and securely following organisational procedures
- 5.10 Present documents to the required format and within the agreed deadlines

## Evidence requirements

| Learning Outcomes | Assessment Criteria     | Assessment guidance   |
|-------------------|-------------------------|---|
| 1.                | 1.1 – 1.3               | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1 – 2.3               |   |
| 3.                | 3.1 – 3.7               |   |
| 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"><li>• letters</li><li>• emails</li><li>• memos</li></ul> |
| 5.                | 5.1 – 5.3<br>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  |
|                   | 5.4 – 5.7<br>5.9 – 5.10 | 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"><li>• documents produced</li></ul>                       |

**Level:** 2

**Credit value:** 3

**NDAQ number:** A/601/2483

### Unit aim

This unit is about preparing different types of text from own notes and notes written by other people to meet agreed timescales.

### Learning outcomes

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

The learner will:

- 1 Understand preparing text from notes
- 2 Understand the purpose and benefits of following procedures when preparing text from notes
- 3 Be able to prepare for text from notes
- 4 Be able to prepare text from notes

### 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 BAA213.

### 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 preparing text from notes****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be produced from notes and the formats to be followed
- 1.2 Explain the difference between producing text from own notes and producing text from others' notes

**Outcome 2: Understand the purpose and benefits of following procedures when preparing text from notes****Assessment Criteria**

The learner can:

- 2.1 Explain the benefits of agreeing the purpose, format and deadline for preparing text from notes
- 2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text from notes
- 2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
- 2.4 Explain the purpose of storing text and notes safely and securely, and ways of doing so
- 2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
- 2.6 Explain the purpose and benefits of meeting deadlines

**Outcome 3: Be able to prepare for text from notes****Assessment Criteria**

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

**Outcome 4: Be able to prepare text from notes****Assessment Criteria**

The learner can:

- 4.1 Input text using keyboard skills
- 4.2 Format text to agreed style and layout, making efficient use of available technology
- 4.3 Clarify text requirements when necessary
- 4.4 Read and check texts for accuracy
- 4.5 Edit and correct texts, as required

- 4.6 Store texts and original notes safely and securely following organisational procedures
- 4.7 Produce texts to the required format and within agreed deadlines

### 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 – 2.6              |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
| 4.                | 4.1 – 4.2<br>4.4 – 4.7 | 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"> <li>• documents produced</li> </ul>                         |
|                   | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |

## Unit 214

## Prepare text from notes using touch typing (40 wpm)

**Level:** 2

**Credit value:** 3

**NDAQ number:** F/601/2484

### Unit aim

This unit is about preparing different types of text using touch typing at a minimum speed of 40 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from notes using touch typing
- 2 Understand the purpose and benefits of following procedures when preparing text using touch typing
- 3 Be able to prepare for tasks
- 4 Be able to produce texts using touch typing

### 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 BAA215.

### 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 214

# Prepare text from notes using touch typing (40 wpm)

### Outcome 1: Understand the task of preparing text from notes using touch typing

#### Assessment Criteria

The learner can:

- 1.1 Describe different types of documents that may be produced from notes and the formats to be followed
- 1.2 Describe different forms in which texts may be presented
- 1.3 Explain the difference between producing text from own notes and producing text from others' notes

### Outcome 2: Understand the purpose and benefits of following procedures when preparing text using touch typing

#### Assessment Criteria

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for delivering text
- 2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text typed from notes
- 2.3 Describe ways of checking finished documents for accuracy and correctness
- 2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so
- 2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
- 2.6 Explain the purpose of meeting deadlines

### Outcome 3: Be able to prepare for tasks

#### Assessment Criteria

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

### Outcome 4: Be able to produce texts using touch typing

#### Assessment Criteria

The learner can:

- 4.1 Input texts using touch typing to a minimum speed of 40 words per minute
- 4.2 Format texts to agreed style and layout making efficient use of available technology

- 4.3 Clarify text requirements when necessary
- 4.4 Read and check texts for accuracy
- 4.5 Edit and correct texts, as required
- 4.6 Store texts and original notes safely and securely following organisational procedures
- 4.7 Present texts to the required format, within the agreed deadlines

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.3                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                       | 2.1 – 2.6                  |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
| 4.                       | 4.1 – 4.2<br>4.4 – 4.7     | 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"> <li>• documents produced</li> </ul>                         |
|                          | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |

**Level:** 2

**Credit value:** 8

**NDAQ number:** J/601/2485

### Unit aim

This unit is about preparing different types of text from shorthand notes, where the notes are taken at a minimum speed of 60 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from shorthand
- 2 Understand the purpose and value of following procedures when preparing text from shorthand
- 3 Be able to prepare for tasks, and use shorthand to take dictation
- 4 Be able to produce texts from shorthand

### Guided learning hours

It is recommended that 55 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 BAD311.

### 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 task of preparing text from shorthand****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed
- 1.2 Describe different forms in which texts may be presented

**Outcome 2: Understand the purpose and value of following procedures when preparing text from shorthand****Assessment Criteria**

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand
- 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 2.3 Explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so
- 2.4 Explain the purpose of confidentiality and data protection when preparing texts from shorthand notes
- 2.5 Explain the purpose and benefits of meeting deadlines

**Outcome 3: Be able to prepare for tasks, and use shorthand to take dictation****Assessment Criteria**

The learner can:

- 3.1 Agree the purpose, format, and deadlines for preparing texts from shorthand
- 3.2 Take dictation using shorthand at a minimum speed of 60 words per minute

**Outcome 4: Be able to produce texts from shorthand****Assessment Criteria**

The learner can:

- 4.1 Clarify text requirements, when necessary
- 4.2 Input and format texts to an agreed format from shorthand notes
- 4.3 Make efficient use of technology, as required
- 4.4 Read and check texts for accuracy

- 4.5 Edit and correct texts, as required
- 4.6 Store texts and original shorthand notes safely and securely following organisational procedures
- 4.7 Present texts to the required format and within the agreed deadlines

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.2                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                       | 2.1 – 2.5                  |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                          | 3.2                        | 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"> <li>• shorthand notes</li> </ul>                            |
| 4.                       | 4.1                        | Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts  |
|                          | 4.2 – 4.7                  | 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"> <li>• documents produced</li> </ul>                         |



## Unit 216

## Prepare text from recorded audio instruction (40 wpm)

**Level:** 2

**Credit value:** 4

**NDAQ number:** L/601/2486

### Unit aim

This unit is about preparing different types of text from audio recordings, where the recording is made at a minimum speed of 40 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from recorded audio instruction
- 2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction
- 3 Be able to produce texts from audio recordings

### 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 BAD313.

### 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 task of preparing text from recorded audio instruction****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed
- 1.2 Describe different forms in which texts may be presented
- 1.3 Describe the different types of technology that are available for playing back recordings and their main features

**Outcome 2: Understand the purpose and value of following procedures when preparing text from recorded audio instruction****Assessment Criteria**

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
- 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 2.3 Explain the purpose of storing texts and original recordings safely and securely, and ways of doing so
- 2.4 Explain the purpose of confidentiality and data protection when preparing texts from recorded audio
- 2.5 Explain the purpose and benefits of meeting deadlines

**Outcome 3: Be able to produce texts from audio recordings****Assessment Criteria**

The learner can:

- 3.1 Agree the purpose, format, and deadlines for texts
- 3.2 Input text from audio recordings at a minimum speed of 40 words per minute
- 3.3 Format texts to agreed format making efficient use of available technology
- 3.4 Clarify text requirements when necessary
- 3.5 Read and check texts for accuracy
- 3.6 Edit and correct texts, as required
- 3.7 Store texts and original recordings safely and securely following organisational procedures
- 3.8 Present texts to the required format and within the agreed deadlines

## Evidence requirements

| Learning Outcomes | Assessment Criteria    | Assessment guidance   |
|-------------------|------------------------|---|
| 1.                | 1.1 – 1.3              | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1 – 2.5              |   |
| 3.                | 3.1<br>3.4             | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 3.2 – 3.3<br>3.5 – 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 from the following sources: <ul style="list-style-type: none"> <li>• documents produced</li> </ul>                         |

**Level:** 2

**Credit value:** 3

**NDAQ number:** R/601/2487

### **Unit aim**

This unit is about organising and reporting data to the agreed format and timescales.

### **Learning outcomes**

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

The learner will:

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

### **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 BAD321.

### **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 report data that has been researched

#### Assessment Criteria

The learner can:

- 1.1 Describe different ways of organising data that has been researched
- 1.2 Describe different ways of reporting data
- 1.3 Describe the purpose of presenting data to the agreed format and within the agreed timescale

### Outcome 2: Be able to organise data

#### Assessment Criteria

The learner can:

- 2.1 Organise data so that it can be reported
- 2.2 Check the accuracy of the data, and make adjustments, if required
- 2.3 Obtain feedback on data collected, if required

### Outcome 3: Be able to report data

#### Assessment Criteria

The learner can:

- 3.1 Present data in agreed format
- 3.2 Present data to agreed timescale

### Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 – 1.3           | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 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 |

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|     |   |
|-----|---|
| 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"><li>• feedback obtained</li></ul>  |
| 3.  | 3.1 – 3.2<br>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"><li>• letters</li><li>• emails</li><li>• memos</li><li>• examples of data</li></ul> |

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**Level:** 2

**Credit value:** 4

**NDAQ number:** Y/601/2488

### **Unit aim**

This unit is about organising suitable data that has been researched using different sources of information.

### **Learning outcomes**

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

The learner will:

- 1 Understand procedures for researching information
- 2 Be able to research information for others

### **Guided learning hours**

It is recommended that 17 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 BAD323.

### **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 procedures for researching information**

**Assessment Criteria**

The learner can:

- 1.1 Give reasons for agreeing objectives and deadlines for researching information
- 1.2 Give reasons for identifying and agreeing sources of information
- 1.3 Explain the purpose of recording and storing information researched

**Outcome 2: Be able to research information for others**

**Assessment Criteria**

The learner can:

- 2.1 Agree aims, objectives and deadlines for the information search
- 2.2 Identify sources of information
- 2.3 Search for and obtain data
- 2.4 Check that data is suitable for the purpose of the research
- 2.5 Record the data and store it securely
- 2.6 Make a record of information sources used
- 2.7 Meet deadlines for completing research

**Evidence requirements**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.3                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                       | 2.1<br>2.4                 | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• notes of informal meetings</li> </ul> |
|                          | 2.2 – 2.3<br>2.7           | 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  |



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2.5 – 2.6 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:

- records

## Unit 219

## Store and retrieve information

**Level:** 2

**Credit value:** 3

**NDAQ number:** R/601/2490

### Unit aim

This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation.

### Learning outcomes

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

The learner will:

- 1 Understand processes and procedures for storing and retrieving information
- 2 Be able to store information
- 3 Be able to retrieve information

### Guided learning hours

It is recommended that 17 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 BAD332.

### 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 processes and procedures for storing and retrieving information****Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of storing and retrieving required information
- 1.2 Describe different information systems and their main features
- 1.3 Explain the purpose of legal and organisational requirements for the security and confidentiality of information
- 1.4 Explain the purpose of confirming information to be stored and retrieved
- 1.5 Describe ways of checking information for accuracy
- 1.6 Explain the purpose of checking information for accuracy
- 1.7 Explain the purpose of providing information to agreed format and timescales
- 1.8 Describe the types of information that may be deleted
- 1.9 Describe problems that may occur with information systems and how to deal with them, when necessary

**Outcome 2: Be able to store information****Assessment Criteria**

The learner can:

- 2.1 Identify, confirm and collect information to be stored
- 2.2 Follow legal and organisational procedures for security and confidentiality of information to be stored
- 2.3 Store information in approved locations
- 2.4 Check and update stored information, if required
- 2.5 Delete stored information, if required
- 2.6 Deal with, or refer problems, if required

**Outcome 3: Be able to retrieve information****Assessment Criteria**

The learner can:

- 3.1 Confirm and identify information to be retrieved
- 3.2 Follow legal and organisational procedures for security and confidentiality of information
- 3.3 Locate and retrieve the required information
- 3.4 Check and update information, if required

3.5 Provide information in the agreed format and timescale

3.6 Deal with, or refer problems if required

## 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  | 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"><li>• letters</li><li>• emails</li><li>• memos</li><li>• information</li></ul> |
|                   | 2.6  |   |
| 3.                | 2.2 – 2.5  | 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  |
|                   | 3.1  | 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"><li>• letters</li><li>• emails</li><li>• memos</li><li>• information</li></ul> |
|                   | 3.3 – 3.6  |   |
| 3.2               | 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 |   |

**Level:** 2

**Credit value:** 2

**NDAQ number:** Y/601/2491

### **Unit aim**

This unit is about deciding and agreeing the information to be archived and deleted within a business environment, including, working with external archive systems if this function is outsourced from an organisation.

### **Learning outcomes**

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

The learner will:

- 1 Understand procedures for archiving information
- 2 Be able to archive information

### **Guided learning hours**

It is recommended that 13 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 BAD334.

### **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 procedures for archiving information****Assessment Criteria**

The learner can:

- 1.1 Explain why and when required information should be archived
- 1.2 Explain the purpose of agreeing retention periods for archiving information
- 1.3 Describe procedures to be followed for archiving information, including legal requirements, if required
- 1.4 Explain the purpose of organisational and legal requirements for the security and confidentiality of archived information
- 1.5 Explain the purpose of deciding and agreeing information to be archived
- 1.6 Describe procedures for recording and keeping archived information
- 1.7 Explain how to retrieve archived information
- 1.8 Describe how to delete information from an archive system
- 1.9 Describe problems that may occur with systems containing archived information and how to deal with them or refer them
- 1.10 Describe the purpose of conforming to requirements of an external archive system, if outsourced from the organisation

**Outcome 2: Be able to archive information****Assessment Criteria**

The learner can:

- 2.1 Decide and agree the information to be archived, retrieved and deleted
- 2.2 Decide and agree on the retention period for information being archived
- 2.3 Follow legal and organisational policies and procedures for security and confidentiality of information
- 2.4 Archive information to the agreed brief and timescale
- 2.5 Maintain and update a record of information archived
- 2.6 Resolve or refer problems, if required
- 2.7 Retrieve archived information on request
- 2.8 Delete archived information, if required
- 2.9 Conform to requirements of external archive systems, if outsourced from the organisation

## Evidence requirements

| Learning Outcomes | Assessment Criteria           | Assessment guidance  |
|-------------------|-------------------------------|--|
| 1.                | 1.1 – 1.10                    | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 2.2<br>2.4<br>2.6 – 2.9 | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• information</li> </ul> |
|                   | 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   |
|                   | 2.5                           | 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"> <li>• records</li> </ul>   |

## Unit 221                      Use office equipment

**Level:**                      2  
**Credit value:**            4  
**NDAQ number:** H/601/2493

### Unit aim

This unit is about using a variety of different office equipment following manufacturer's and organisational guidelines.

### Learning outcomes

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

The learner will:

- 1 Know about different types of office equipment and its uses
- 2 Understand the purpose of following instructions and health and safety procedures
- 3 Understand how to use equipment in a way that minimises waste
- 4 Know about the different types of problems that may occur when using equipment and how to deal with them
- 5 Understand the purpose of meeting work standards and deadlines
- 6 Understand the purpose of leaving equipment and the work area ready for the next user
- 7 Be able to use office equipment

### 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 BAA231.

### 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: Know about different types of office equipment and its uses**

#### **Assessment Criteria**

The learner can:

- 1.1 Identify different types of equipment and their uses
- 1.2 Describe the different features of different types of office equipment
- 1.3 Explain why different types of equipment are chosen for tasks

### **Outcome 2: Understand the purpose of following instructions and health and safety procedures**

#### **Assessment Criteria**

The learner can:

- 2.1 Explain the purpose of following manufacturer's instructions when using equipment
- 2.2 Explain the purpose of following organisational instructions when using equipment
- 2.3 Identify health and safety procedures for using different types of equipment
- 2.4 Explain the purpose of following health and safety procedures when using equipment
- 2.5 Explain the purpose of keeping equipment clean and hygienic

### **Outcome 3: Understand how to use equipment in a way that minimises waste**

#### **Assessment Criteria**

The learner can:

- 3.1 Give examples of waste when using equipment
- 3.2 Give examples of ways to reduce waste
- 3.3 Explain the purpose of minimising waste

### **Outcome 4: Know about the different types of problems that may occur when using equipment and how to deal with them**

#### **Assessment Criteria**

The learner can:

- 4.1 Give examples of equipment problems
- 4.2 Explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems
- 4.3 Give examples of how to deal with problems

## Outcome 5: Understand the purpose of meeting work standards and deadlines

### Assessment Criteria

The learner can:

- 5.1 Explain the purpose of meeting work standards and deadlines when using equipment

## Outcome 6: Understand the purpose of leaving equipment and the work area ready for the next user

### Assessment Criteria

The learner can:

- 6.1 Explain the purpose of leaving equipment and the work area ready for the next user

## Outcome 7: Be able to use office equipment

### Assessment Criteria

The learner can:

- 7.1 Locate and select equipment needed for a task
- 7.2 Use equipment following manufacturer's and organisational guidelines
- 7.3 Use equipment minimising waste
- 7.4 Keep equipment clean and hygienic
- 7.5 Deal with equipment problems following manufacturer's and organisational procedures
- 7.6 Refer problems, if required
- 7.7 Make sure final work product meets agreed requirements
- 7.8 Make sure that product is delivered to agreed timescale
- 7.9 Make sure equipment, resources and work area are ready for the next user

## Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance   |
|-------------------|---------------------|---|
| 1.                | 1.1 – 1.3           | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning |
| 2.                | 2.1 – 2.5           |   |
| 3.                | 3.1 – 3.3           |   |
| 4.                | 4.1 – 4.3           |   |
| 5.                | 5.1                 |   |
| 6.                | 6.1                 |   |

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7.            7.1 - 7.9        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:
- letters
  - emails
  - memos

## Unit 222

## Maintain and issue stationery stock items

**Level:** 2

**Credit value:** 3

**NDAQ number:** M/601/2495

### Unit aim

This unit is about the procedures involved in keeping a stock of business items that will be used in a business environment in order to complete the day to day work of the organisation.

### Learning outcomes

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

The learner will:

- 1 Understand procedures for maintaining and issuing stationery stock items
- 2 Know how to handle, store and dispose of stationery stock items
- 3 Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them
- 4 Understand how to make recommendations for improving stationery stock handling
- 5 Be able to maintain stationery stock levels
- 6 Be able to issue items from stationery stock
- 7 Be able to deal with unwanted or damaged items of stationery stock
- 8 Be able to make recommendations to improve stationery stock handling

### 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 BAF141.

### 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 procedures for maintaining and issuing stationery stock items****Assessment Criteria**

The learner can:

- 1.1 Outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationery stock items
- 1.2 Outline ways of keeping up-to-date, accurate and legible records of stationery stock items
- 1.3 Explain the purpose of knowing the level of demand for stationery stock items and how this may affect requirements for ordering and stock held
- 1.4 Outline other factors that may affect the future level of demand for stationery stock held
- 1.5 Give examples of suppliers that may be used when ordering stationery stock items
- 1.6 Outline differences between ordering stationery stock items from internal and external suppliers
- 1.7 Outline organisational procedures for issuing stationery stock items
- 1.8 Outline when it may be necessary to ask for receipts for stationery stock items issued

**Outcome 2: Know how to handle, store and dispose of stationery stock items****Assessment Criteria**

The learner can:

- 2.1 Outline organisational procedures for handling and storing stationery stock items safely and securely
- 2.2 Outline organisational procedures for the correct and safe disposal of stationery stock items

**Outcome 3: Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them****Assessment Criteria**

The learner can:

- 3.1 Describe types of problems that may occur with deliveries and stationery stock items
- 3.2 Describe organisational procedures for dealing with problems

## **Outcome 4: Understand how to make recommendations for improving stationery stock handling**

### **Assessment Criteria**

The learner can:

- 4.1 Describe organisational procedures for recommending improvements for ordering, taking delivery, storing, stock-taking, issuing and disposing of unwanted or damaged stationery stock items

## **Outcome 5: Be able to maintain stationery stock levels**

### **Assessment Criteria**

The learner can:

- 5.1 Maintain stationery stock items to required levels
- 5.2 Handle and store stationery stock safely and securely, maintaining its condition and following organisational procedures
- 5.3 Carry out stock-takes as instructed and report problems
- 5.4 Order stationery stock from suppliers within limits of own authority
- 5.5 Chase up orders with suppliers
- 5.6 Check incoming deliveries against orders and report any problems
- 5.7 Keep up-to-date, accurate and legible records of stationery stock delivered and held

## **Outcome 6: Be able to issue items from stationery stock**

### **Assessment Criteria**

The learner can:

- 6.1 Issue stationery stock items as requested, following organisational procedures
- 6.2 Keep up-to-date, accurate and legible records of stationery stock items issued

## **Outcome 7: Be able to deal with unwanted or damaged items of stationery stock**

### **Assessment Criteria**

The learner can:

- 7.1 Dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements

## **Outcome 8: Be able to make recommendations to improve stationery stock handling**

### **Assessment Criteria**

The learner can:

- 8.1 Identify and recommend ways in which systems for receiving, issuing and disposing of stationery stock could be improved, as required

## 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 - 2.2           |   |
| 3.                | 3.1 – 3.2           |   |
| 4.                | 4.1                 |   |
| 5.                | 5.1                 | Evidence may be supplied via witness testimony and candidate reports/reflective accounts  |
|                   | 5.2 - 5.3<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• stock records</li> </ul>  |
|                   | 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"> <li>• purchase orders</li> </ul>  |
|                   | 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 from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>                           |
|                   | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• delivery notes</li> </ul> |

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|    |           |   |
|----|-----------|---|
| 6. | 6.1 - 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"><li>• stock records</li><li>• emails</li><li>• memos</li></ul> |
| 7. | 7.1       | Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts  |
| 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"><li>• emails</li><li>• memos</li><li>• appraisals</li></ul>   |

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**Level:** 2

**Credit value:** 2

**NDAQ number:** L/601/2505

### **Unit aim**

This unit is about supporting the organisation of an event.

### **Learning outcomes**

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

The learner will:

- 1 Understand the role and purpose of providing support with the organisation of an event
- 2 Be able to support the organisation of an event

### **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 BAA311.

### **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 and purpose of providing support with the organisation of an event****Assessment Criteria**

The learner can:

- 1.1 Describe the role and responsibilities required when supporting the organisation of an event
- 1.2 Identify a range of support activities that may be required when supporting the organisation of an event
- 1.3 Identify the purpose and value of giving assistance with organising an event
- 1.4 Describe the different types of events and their main features
- 1.5 Describe the types of risks associated with events and how to minimise these
- 1.6 Outline the types of information that delegates will need
- 1.7 Explain how to identify suitable venues for different types of events
- 1.8 Describe the types of resources needed to prepare for different types of events
- 1.9 Outline the different special requirements that delegates may have and how to meet these
- 1.10 Describe the health, safety and security requirements that need to be considered when organising events

**Outcome 2: Be able to support the organisation of an event****Assessment Criteria**

The learner can:

- 2.1 Contribute to the organisation of an event by:
  - a supporting the implementation of the plan for the event to meet agreed objectives
  - b identifying resources and support needed for organising an event
  - c identifying and costing suitable venues
  - d arranging resources and production of event materials
  - e preparing and sending of invitations to delegates
  - f co-ordinating delegate responses
  - g liaising with the venue to confirm event requirements
  - h providing delegates with joining instructions and event materials
  - i rehearsing arrangements to make sure the event runs smoothly, if required
  - j following all legal and contractual requirements
  - k following the relevant health, safety and security requirements for the event

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.10                 | 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"><li>• letters</li><li>• emails</li><li>• memos</li></ul> |

**Level:** 2

**Credit value:** 3

**NDAQ number:** D/601/2508

### **Unit aim**

This unit is about supporting the co-ordination and delivery of an event.

### **Learning outcomes**

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

The learner will:

- 1 Understand the role and purpose of supporting the co-ordination of an event
- 2 Be able to support the co-ordination of an event

### **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 BAA311.

### **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 and purpose of supporting the co-ordination of an event****Assessment Criteria**

The learner can:

- 1.1 Describe the range of support activities that may be required when supporting the co-ordination of an event
- 1.2 Identify the responsibilities involved in supporting the co-ordination of an event
- 1.3 Describe the types of problems that may occur during events and how to deal with these
- 1.4 Describe the points to observe when clearing and vacating an event
- 1.5 Describe the types of follow-up activities that may be required to carry out the co-ordination of an event

**Outcome 2: Be able to support the co-ordination of an event****Assessment Criteria**

The learner can:

- 2.1 Contribute to the co-ordination of an event by:
  - a preparing the venue and making sure all necessary resources and supporting activities are in place
  - b arranging resources during an event, in line with agreed plans
  - c helping delegates to feel welcome
  - d meeting delegates' needs throughout an event
  - e resolving or referring problems, as required
  - f liaising with the management of the venue to make sure facility resources are in place
  - g clearing, and vacating the venue according to the terms of the contract
  - h preparing and circulating papers, or completing other follow up actions following the event, if required

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>   |
|--------------------------|----------------------------|--|
| 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 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"><li>• letters</li><li>• emails</li><li>• memos</li><li>• evaluation reports</li></ul> |

## Unit 225

# Support the organisation of business travel or accommodation

**Level:** 2

**Credit value:** 3

**NDAQ number:** Y/601/2510

### Unit aim

This unit is about supporting the delivery of business travel or accommodation arrangements following instruction from the organiser or traveller(s).

### Learning outcomes

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

The learner will:

- 1 Understand the purpose of confirming a brief and budget for business travel or accommodation
- 2 Know the sources of information and facilities available to make business travel or accommodation arrangements
- 3 Be able to support the organisation with business travel or accommodation arrangements

### 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 BAA321.

### 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 confirming a brief and budget for business travel or accommodation****Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of obtaining and confirming instructions for arranging business travel or accommodation
- 1.2 Explain the purpose and benefits of confirming the requirements of a brief and budget for business travel or accommodation arrangements
- 1.3 Explain the purpose of following the requirements of a brief and budget for business travel or accommodation arrangements
- 1.4 Describe how to support the organisation of business travel or accommodation to meet expectations
- 1.5 Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow
- 1.6 Describe how to obtain best value for money when making business travel or accommodation arrangements
- 1.7 Describe how to keep records of business travel or accommodation arrangements
- 1.8 Outline the documents and information to provide to the person who is travelling and how to obtain these
- 1.9 Describe the types of problems that may occur with business travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems

**Outcome 2: Know the sources of information and facilities available to make business travel or accommodation arrangements****Assessment Criteria**

The learner can:

- 2.1 Describe sources of information, and the facilities available, for making business travel or accommodation arrangements

**Outcome 3: Be able to support the organisation with business travel or accommodation arrangements****Assessment Criteria**

The learner can:

- 3.1 Confirm the brief and budget for business travel or accommodation arrangements
- 3.2 Check a draft itinerary and schedule with organiser or traveller(s)
- 3.3 Identify suitable business travel or accommodation options



- 3.4 Book suitable business travel or accommodation arrangements, following instructions:
  - a to meet the brief and budget using available sources of information and facilities
  - b obtaining best value for money
  - c making payment or agreeing payment arrangements
- 3.5 Obtain confirmations, and collate documents for business travel or accommodation arrangements
- 3.6 Maintain records of business travel or accommodation arranged
- 3.7 Provide the organiser or traveller(s) with an itinerary and required documents in good time
- 3.8 Confirm with the organiser or traveller(s) that itinerary and documents meet requirements
- 3.9 Resolve or refer problems to the appropriate person

## 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                    |  |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• briefs</li> <li>• budgets</li> </ul> |
|                   | 3.2 – 3.5<br>3.7 – 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 from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>                                      |
|                   | 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"> <li>• records</li> </ul>   |

## Unit 226

## Support the organisation of meetings

**Level:** 2

**Credit value:** 4

**NDAQ number:** T/601/2515

### Unit aim

This unit is about supporting the planning and organisation of meetings.

### Learning outcomes

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

The learner will:

- 1 Understand the arrangements to be made to support the planning and organising of meetings
- 2 Be able to prepare for a meeting
- 3 Be able to follow up a meeting

### 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 BAA411.

### 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 to be made to support the planning and organising of meetings****Assessment Criteria**

The learner can:

- 1.1 Describe the role and responsibilities for supporting the organiser of the meeting
- 1.2 Describe different types of meetings and their main features
- 1.3 Describe how to help plan meetings to meet agreed aims and objectives
- 1.4 Describe the types of resources that may be needed for different types of meetings
- 1.5 Describe health, safety and security arrangements to follow when organising meetings
- 1.6 Explain the purpose of following the agreed brief, plan and the resources required, for arranging a meeting
- 1.7 Identify the sources and types of information and services needed to arrange a meeting
- 1.8 Describe how to help the meeting organiser during the meeting
- 1.9 Describe the organisational procedures for clearing and vacating a meeting room

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

The learner can:

- 2.1 Confirm the purpose and venue of a meeting
- 2.2 Confirm a budget for a meeting, if required
- 2.3 Organise and confirm venue, equipment and catering requirement, if required requirements
- 2.4 Invite attendees and confirm attendance
- 2.5 Collate and dispatch papers for a meeting within agreed timescales
- 2.6 Make sure attendees' needs are met
- 2.7 Make sure equipment and layout of the rooms meets the meeting brief
- 2.8 Keep records of arrangements made and services used
- 2.9 Attend to any requirements during the meeting as directed by the meeting organiser

**Outcome 3: Be able to follow up a meeting****Assessment Criteria**

The learner can:

- 3.1 Follow organisation procedures for clearing a meeting room
- 3.2 Circulate a meeting record to agreed timescales
- 3.3 Make sure arrangements for payments have been met, if required

## 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<br>2.3 – 2.6    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• event documentation</li> </ul> |
|                   | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budgets</li> </ul>             |
|                   | 2.7<br>2.9          | 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   |
|                   | 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"> <li>• records</li> </ul>   |
| 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   |
|                   | 3.2 – 3.4           | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>                                |

**Level:** 2

**Credit value:** 3

**NDAQ number:** F/601/2517

### Unit aim

This unit is about recognising the effects of changes in workplace activities and the people who carry them out.

### Learning outcomes

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

The learner will:

- 1 Understand the causes and effects of change in a business environment
- 2 Understand own role in supporting change
- 3 Understand own role in responding to change
- 4 Be able to respond to change
- 5 Be able to support the evaluation of change

### 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 BAA111.

### 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 causes and effects of change in a business environment****Assessment Criteria**

The learner can:

- 1.1 Give examples of changes in working practices in a business environment, and explain why they are happening
- 1.2 Describe the possible effects of changes in working practices on people within a business environment
- 1.3 Explain how change can benefit an organisation, team and individual

**Outcome 2: Understand own role in supporting change****Assessment Criteria**

The learner can:

- 2.1 Describe ways in which individuals can support change in a business environment
- 2.2 Explain the purpose and benefits of contributing to planning for change
- 2.3 Explain how individuals can prepare for changes within a business environment and in ways of working
- 2.4 Describe the types of support that people need during change
- 2.5 Explain the benefits of good communication with others and accurate information during change
- 2.6 Describe how to identify the effects of changes on own work and reasons for doing so
- 2.7 Explain the purpose of reviewing the effects of changes on people, processes and outcomes
- 2.8 Describe ways of reviewing the effects of changes on people, processes and outcomes

**Outcome 3: Understand own role in responding to change****Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of change as part of a process of continuous improvement
- 3.2 Explain the possible effects of changes on own values
- 3.3 Explain the benefits of responding positively to changes

## Outcome 4: Be able to respond to change

### Assessment Criteria

The learner can:

- 4.1 Identify changes needed in own area of work
- 4.2 Make suggestions for change
- 4.3 Complete own work tasks using changed procedures or ways of working
- 4.4 Identify where training or other support is needed
- 4.5 Actively seek support, as required
- 4.6 Give support to other people during change, or seek support, as required
- 4.7 Ask questions to clarify issues

## Outcome 5: Be able to support the evaluation of change

### Assessment Criteria

The learner can:

- 5.1 Give feedback on the effects of changes in own work
- 5.2 Make suggestions for further actions, as required

## Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 – 1.3           | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 2.8           |  |
| 3.                | 3.1 – 3.3           |  |
| 4.                | 4.1<br>4.4          | Evidence may be supplied via candidate reports/reflective accounts   |
|                   | 4.2                 | 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"><li>• letters</li><li>• emails</li><li>• memos</li></ul> |
|                   | 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"><li>• Tasks completed</li></ul>                          |
|                   | 4.5. – 4.7          | Evidence may be supplied via witness testimony and candidate reports/reflective accounts   |

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5. 5.1 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:
- feedback given by learner
- 
- 5.2 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:
- letters
  - emails
  - memos



## Unit 228

# Support the management and development of an information system

**Level:** 2

**Credit value:** 7

**NDAQ number:** J/601/2518

### Unit aim

This unit is about supporting the management and evaluation of an information system to meet identified needs in a business environment.

### Learning outcomes

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

The learner will:

- 1 Understand how to contribute to the management of an information system
- 2 Understand how to contribute to the review and further development of an information system
- 3 Be able to contribute to the management of an information system
- 4 Be able to contribute to the evaluation of an information system

### 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 BAD121.

### 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 the management of an information system****Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of managing information to meet requirements
- 1.2 Explain the purpose and value of supporting training for users and giving or requesting on-going support
- 1.3 Explain the purpose of complying with legal and organisation requirements when using an information system
- 1.4 Explain the purpose of contributing to the monitoring of an information system in use
- 1.5 Explain the purpose of contributing to the maintenance and updating of an information system
- 1.6 Describe ways of contributing to the maintenance and updating of an information system
- 1.7 Describe the types of problems that may occur with an information system and how to deal with them

**Outcome 2: Understand how to contribute to the review and further development of an information system****Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and value of contributing to the continuous improvement of an information system
- 2.2 Explain how to identify problems in an information system and report them
- 2.3 Describe ways of contributing to the resolution of problems in an information system

**Outcome 3: Be able to contribute to the management of an information system****Assessment Criteria**

The learner can:

- 3.1 Contribute to training on the use of an information system
- 3.2 Contribute to supporting users, if required
- 3.3 Monitor own use of an information system
- 3.4 Confirm legal and organisational requirements for handling information are followed
- 3.5 Make sure a system is maintained and updated, within limits of own authority
- 3.6 Identify and report problems when they occur

## Outcome 4: Be able to contribute to the evaluation of an information system

### Assessment Criteria

The learner can:

- 4.1 Provide feedback on performance of an information system
- 4.2 Contribute to the evaluation of feedback and prioritising of development needs, if required
- 4.3 Contribute information to enable further system development

### Evidence requirements

| Learning Outcomes | Assessment Criteria | Assessment guidance  |
|-------------------|---------------------|--|
| 1.                | 1.1 – 1.7           | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                | 2.1 – 2.3           |  |
| 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"> <li>• training records</li> <li>• diary</li> </ul>                           |
|                   | 3.2<br>3.6 – 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 from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• diary</li> </ul> |
|                   | 3.3 – 3.5           | Evidence may be supplied via observation of workplace activities, witness testimony, and candidate reports/reflective accounts   |
| 4.                | 4.1 – 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"> <li>• feedback</li> <li>• minutes of meetings</li> </ul>                     |

## Unit 229

## Meet and welcome visitors

**Level:** 2

**Credit value:** 3

**NDAQ number:** Y/601/2457

### Unit aim

This unit covers the procedures to follow and hospitality to offer when meeting and welcoming visitors to business premises.

### Learning outcomes

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

The learner will:

- 1 Understand procedures for meeting and welcoming visitors
- 2 Be able to meet and welcome visitors

### Guided learning hours

It is recommended that 23 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 BAC311.

### 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 procedures for meeting and welcoming visitors****Assessment Criteria**

The learner can:

- 1.1. Describe different reasons for people visiting a business, their requirements and how their needs may be met
- 1.2 Explain the purpose of dealing with visitors promptly and courteously
- 1.3 Explain the purpose of presenting a positive image of self and the organisation
- 1.4 Explain the purpose of following health, safety and security procedures when dealing with visitors, including own responsibilities
- 1.5 Describe different types of problems that may occur with visitors including, conflict and aggression
- 1.6 Describe ways of dealing with different problems and when to refer them to an appropriate colleague
- 1.7 Explain the purpose of communicating with visitors
- 1.8 Describe organisation structures and communication channels within the organisation

**Outcome 2: Be able to meet and welcome visitors****Assessment Criteria**

The learner can:

- 2.1 Greet visitor(s) and make them feel welcome
- 2.2 Identify visitors and the reason for their visit
- 2.3 Use the organisation's systems to receive and record visitors, as appropriate
- 2.4 Make sure visitors' needs are met
- 2.5 Present positive image of self and the organisation
- 2.6 Follow health, safety and security procedures, as required
- 2.7 Inform others of visitors' arrival, as required, in line with appropriate communication channels
- 2.8 Deal with any problems that may occur, or refer problems to the appropriate person
- 2.9 Follow procedures for departing visitors, as required

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>   |
|--------------------------|----------------------------|--|
| 1.                       | 1.1 – 1.8                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning  |
| 2.                       | 2.1 - 2.2<br>2.4 – 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   |
|                          | 2.3<br>2.9                 | 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"><li>• visitors book</li></ul> |

## Unit 230

## Administer human resource records

**Level:** 2

**Credit value:** 3

**NDAQ number:** T/601/2790

### Unit aim

This unit covers the knowledge and understanding learners need to administer Human Resource records. It also covers the practical application of this knowledge and understanding.

### Learning outcomes

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

The learner will:

- 1 Understand how to create personnel files for new starters
- 2 Understand how to maintain Human Resource information
- 3 Understand how to report Human Resource information
- 4 Understand the organisational and legal requirements for administering Human Resource records
- 5 Be able to create personnel files for new starters
- 6 Be able to maintain Human Resource information
- 7 Be able to report Human Resource information
- 8 Be able to comply with organisational and legal requirements

### 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 BAB151.

### 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 create personnel files for new starters****Assessment Criteria**

The learner can:

- 1.1 Describe the systems, procedures and software used by the organisation for administering Human Resource records
- 1.2 Describe the information that should be entered in a new personnel file

**Outcome 2: Understand how to maintain Human Resource information****Assessment Criteria**

The learner can:

- 2.1 Explain how to enter and update Human Resource information in a personnel file
- 2.2 Describe the Human Resource information that should be held for members of staff
- 2.3 Explain the action that should be taken if Human Resource information is incomplete

**Outcome 3: Understand how to report Human Resource information****Assessment Criteria**

The learner can:

- 3.1 Describe the types of Human Resource reports that may be requested
- 3.2 Explain how to produce reports from individual or multiple Human Resource files

**Outcome 4: Understand the organisational and legal requirements for administering Human Resource records****Assessment Criteria**

The learner can:

- 4.1 Describe the current legislation that applies when dealing with Human Resource records
- 4.2 Clarify the limits and scope of responsibilities and authority in administering HR records
- 4.3 Describe the data protection principles that apply to HR records
- 4.4 Explain organisation procedures for confidentiality of HR records
- 4.5 Explain organisation procedures for security of HR records
- 4.6 Explain the purpose of confidentiality and security of HR information
- 4.7 Describe the potential consequences of a breach of confidentiality or security
- 4.8 Explain organisation policy and procedure for removal of out of date HR information
- 4.9 Explain organisation policy and procedure for archiving HR information



## **Outcome 5: Be able to create personnel files for new starters**

### **Assessment Criteria**

The learner can:

- 5.1 Open a new personnel file
- 5.2 Record required information about employee
- 5.3 File relevant employee documents
- 5.4 Process monitoring data, as appropriate
- 5.5 Check that information is complete, requesting missing information where necessary

## **Outcome 6: Be able to maintain Human Resource information**

### **Assessment Criteria**

The learner can:

- 6.1 Keep required personnel information up to date
- 6.2 Maintain records of personnel information
- 6.3 Process and file relevant correspondence and documentation

## **Outcome 7: Be able to report Human Resource information**

### **Assessment Criteria**

The learner can:

- 7.1 Provide information from individual personnel files as requested
- 7.2 Provide management information reports as requested

## **Outcome 8: Be able to comply with organisational and legal requirements**

### **Assessment Criteria**

The learner can:

- 8.1 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information
- 8.2 Remove out of date information in line with organisational policy and procedures
- 8.3 Archive relevant information in line with current legislation and organisational policy and procedures

## Unit 231

# Administer the recruitment and selection process

**Level:** 2

**Credit value:** 4

**NDAQ number:** A/601/2791

### Unit aim

This unit covers the knowledge and understanding learners need to administer the recruitment and selection process. It also covers the practical application of this knowledge and understanding.

### Learning outcomes

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

The learner will:

- 1 Understand how to advertise job vacancies
- 2 Understand how to respond to potential applicants
- 3 Understand how to administer the selection process
- 4 Understand how to administer the appointment process
- 5 Be able to advertise job vacancies
- 6 Be able to respond to potential applicants
- 7 Be able to administer the selection process
- 8 Be able to administer the appointment process

### 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 BAB152.

### 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 advertise job vacancies****Assessment Criteria**

The learner can:

- 1.1 Explain organisational policies, procedures and constraints that affect the area of responsibility
- 1.2 Explain the procedures to identify and process personnel requirements in the organisation
- 1.3 Explain ways in which personnel requirements are expressed in job descriptions and persons specifications
- 1.4 Explain how to interpret personnel requirements in job descriptions and persons specifications
- 1.5 Describe the current legislation, that applies when dealing with recruitment and selection
- 1.6 Clarify the limits and scope of their responsibilities and authority in administering the recruitment and selection process
- 1.7 Describe the types of information to include in a job advertisement
- 1.8 Explain the legal/organisational requirements that affect the type of information in the job advertisement
- 1.9 Explain how to place advertisements in different locations
- 1.10 Explain how to liaise with recruitment agencies

**Outcome 2: Understand how to respond to potential applicants****Assessment Criteria**

The learner can:

- 2.1 Describe the type of information that should be in an application pack
- 2.2 Describe the types of queries that applicants may have
- 2.3 Explain how to respond to the queries that applicants may have
- 2.4 Explain how to keep records of responses received
- 2.5 Clarify the purpose of keeping records of responses received

**Outcome 3: Understand how to administer the selection process****Assessment Criteria**

The learner can:

- 3.1 Describe organisational procedures used to shortlist the applicants
- 3.2 Describe the procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process
- 3.3 Explain how to process feedback for unsuccessful applicants

- 3.4 Describe the different types of selection processes that may be used and how they work
- 3.5 Clarify the selection processes used in the organisation and their role in those
- 3.6 Explain the administrative support needed for different types of selection processes
- 3.7 Explain the procedures for obtaining the resources needed for the selection process
- 3.7 Describe the range of documentation that is used for selection by their organisation
- 3.8 Clarify the purpose of giving candidates a favourable impression of the organisation
- 3.9 Describe the range of records that must be kept following the selection process
- 3.10 Explain the purpose of following organisational procedures for keeping records following the selection process

## **Outcome 4: Understand how to administer the appointment process**

### **Assessment Criteria**

The learner can:

- 4.1 Describe the range of pre-employment checks
- 4.2 Explain how to carry out pre-employment checks
- 4.3 Explain how to format offer letters and employment contracts
- 4.4 Explain the purpose of confidentiality and security of record keeping

## **Outcome 5: Be able to advertise job vacancies**

### **Assessment Criteria**

The learner can:

- 5.1 Confirm the personnel requirements with the responsible person
- 5.2 Confirm the information that will appear in the job advertisement
- 5.3 Confirm how the vacancy will be advertised
- 5.4 Advertise the vacancy as agreed
- 5.5 Liaise with relevant agencies to confirm details of job vacancies
- 5.6 Liaise with the relevant agencies to make sure they understand the requirements of the organisation

## **Outcome 6: Be able to respond to potential applicants**

### **Assessment Criteria**

The learner can:

- 6.1 Send out application packs or other information to potential applicants
- 6.2 Respond appropriately to queries from potential applicants
- 6.3 Maintain records of responses received

## **Outcome 7: Be able to administer the selection process**

### **Assessment Criteria**

The learner can:

- 7.1 Collate applications and make available to those involved in the selection
- 7.2 Invite shortlisted candidates to take part in the selection process
- 7.3 Process feedback to unsuccessful applicants
- 7.4 Keep records of responses from shortlisted candidates
- 7.5 Provide appropriate support for the selection process
- 7.6 Help to make sure candidates have a positive impression of the organisation
- 7.7 Keep records of the outcomes of the selection process

## **Outcome 8: Be able to administer the appointment process**

### **Assessment Criteria**

The learner can:

- 8.1 Carry out appropriate pre-employment checks
- 8.2 Format and send out offer letters and employment contracts
- 8.3 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements

**Level:** 2

**Credit value:** 4

**NDAQ number:** J/601/2647

### **Unit aim**

This unit is about the skills, knowledge and understanding required to administer dispensations.

### **Learning outcomes**

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

The learner will be able to:

1. Understand the organisational and legal context for administering parking dispensations
2. Understand the processes involved in administering parking dispensations
3. Be able to receive and process applications for parking dispensations
4. Be able to issue documentation for parking dispensations

### **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 standards (if appropriate)**

This unit directly relates to the Business and Administration BAB131.

### **Support of the unit by a sector or other appropriate body (if required)**

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 243 Administer parking dispensations

### Outcome 1: Understand the organisational and legal context for administering parking dispensations

#### Assessment Criteria

The learner can:

- 1.1 Describe the services that they are responsible for
- 1.2 Clarify the limits and scope of their responsibilities and authority in providing services
- 1.3 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility
- 1.4 Explain how to apply the organisation's policies, procedures and constraints that affect services in their area of responsibility
- 1.5 Describe the current legislation, Traffic Regulation Orders and other regulations that apply
- 1.6 The requirements of the Data Protection Act and its implications for own role
- 1.7 Describe the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges
- 1.8 Explain how to use the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges

### Outcome 2: Understand the processes involved in administering parking dispensations

#### Assessment Criteria

The learner can:

- 2.1 Explain the criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations / waivers and blue badges
- 2.2 Clarify the range of checks that are relevant to applications
- 2.3 Explain how and when to carry out the range of checks that are relevant to applications
- 2.4 Clarify the organisation's anti-fraud policies and procedures
- 2.5 Explain how to operate the organisation's anti-fraud policies and procedures
- 2.6 Describe the evidence required to support an application for a permit, season tickets, suspension, dispensation / waiver or blue badge
- 2.7 Explain the payment and refund processing within the organisation
- 2.8 Explain how to communicate effectively with customers and other relevant departments
- 2.9 Clarify the importance of the audit trail of controlled stationery
- 2.10 Explain how to update and maintain records as necessary

### Outcome 3: Be able to receive and process applications for parking dispensations

#### Assessment Criteria

The learner can:

- 3.1 Advise customers on criteria for eligibility
- 3.2 Review applications and supporting evidence against published criteria
- 3.3 Seek additional evidence from the customer if required
- 3.4 Carry out relevant checks in accordance with organisational procedures
- 3.5 Where necessary, seek opinions from appropriate medical professionals
- 3.6 Handle supporting documentation securely and in line with current legislation or relevant terms and conditions

3.7 Make a decision to approve or decline the application

## **Outcome 4: Be able to issue documentation for parking dispensations**

### **Assessment Criteria**

The learner can:

- 4.1 Communicate the decision to the customer, return documentation where necessary and issue appropriate paperwork
- 4.2 Maintain appropriate records including renewals
- 4.3 Process payments and handle refunds in line with organisational procedures
- 4.4 Communicate the decision or information to other relevant departments



**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 Outcomes | Assessment Criteria    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 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"> <li>• plans</li> </ul>  |
|                   | 2.3 – 2.4<br>2.8 – 2.9 | Evidence may be supplied via candidate reports/reflective accounts   |
| 2.5<br>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"> <li>• feedback received</li> </ul>                          |
|                   | 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"> <li>• handouts</li> </ul>   |

**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"><li>• letters</li><li>• emails</li><li>• memos</li></ul> |
| 4.                | 4.1                 | Evidence may be supplied via candidate reports/reflective accounts   |

|            |           |  |
|------------|-----------|--|
| 4.2        |           | <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"> <li>• presentation materials</li> </ul>  |
| 4.3 – 4.11 |           | <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 learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• presentation notes</li> <li>• handouts</li> <li>• slides</li> </ul> |
| 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"> <li>• feedback</li> <li>• evaluation sheets</li> </ul>   |
|            | 5.2 – 5.3 | <p>Evidence may be supplied via candidate reports/reflective accounts</p>  |

## Unit 312

## Design and produce documents in a business environment

**Level:** 3

**Credit value:** 4

**NDAQ number:** M/601/2531

### Unit aim

This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles.

### Learning outcomes

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

The learner will:

- 1 Understand the purpose and value of designing and producing high quality and attractive documents
- 2 Know the resources available to design and produce documents and how to use them
- 3 Understand the purpose and value of following procedures when designing and producing documents
- 4 Be able to design and produce documents to agreed specifications

### 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 BAA212.

### 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 designing and producing high quality and attractive documents****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be designed and produced and the different styles that could be used
- 1.2 Describe different formats in which text may be presented
- 1.3 Explain the purpose and benefits of designing and producing high quality and attractive documents

**Outcome 2: Know the resources available to design and produce documents and how to use them****Assessment Criteria**

The learner can:

- 2.1 Describe the types of resources needed to design and produce high quality and attractive documents
- 2.2 Explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents
- 2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features

**Outcome 3: Understand the purpose and value of following procedures when designing and producing documents****Assessment Criteria**

The learner can:

- 3.1 Explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents
- 3.2 Describe ways of researching and organising content needed for documents
- 3.3 Describe ways of integrating and laying out text and non-text
- 3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 3.5 Explain the purpose of storing documents safely and securely, and ways of doing so
- 3.6 Explain the purpose of confidentiality and data protection when preparing documents
- 3.7 Explain the purpose and benefits of meeting deadlines

## Outcome 4: Be able to design and produce documents to agreed specifications

### Assessment Criteria

The learner can:

- 4.1 Agree the purpose, content, style and deadlines for documents
- 4.2 Identify and prepare resources needed to design and produce documents
- 4.3 Research and organise the content required for documents
- 4.4 Make appropriate and efficient use of technology, as required
- 4.5 Design, format and produce documents to an agreed style
- 4.6 Integrate non-text objects into an agreed layout, if required
- 4.7 Check texts and objects for accuracy
- 4.8 Edit and correct texts and objects as required
- 4.9 Clarify document requirements, if necessary
- 4.10 Store documents safely and securely following organisational procedures
- 4.11 Present documents to the required format, and within the agreed deadlines

### Evidence requirements

| Learning Outcomes | Assessment Criteria      | Assessment guidance   |
|-------------------|--------------------------|---|
| 1.                | 1.1 – 1.3                | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1 – 2.3                |   |
| 3.                | 3.1 – 3.7                |   |
| 4.                | 4.1<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 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  |
|                   | 4.5 – 4.8<br>4.10 – 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"> <li>• documents produced</li> </ul>                         |

## Unit 313

## Prepare text from notes using touch typing (60 wpm)

**Level:** 3

**Credit value:** 4

**NDAQ number:** T/601/2532

### Unit aim

This unit is about preparing different types of text using touch typing at a minimum speed of 60 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from notes using touch typing
- 2 Understand the purpose and benefits of following procedures when preparing text using touch typing
- 3 Be able to prepare for tasks
- 4 Be able to produce texts using touch typing at a minimum speed of 60 wpm

### Guided learning hours

It is recommended that 10 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 BAA216.

### 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 313

# Prepare text from notes using touch typing (60 wpm)

### Outcome 1: Understand the task of preparing text from notes using touch typing

#### Assessment Criteria

The learner can:

- 1.1 Describe different types of documents that may be produced from notes and the format to be followed
- 1.2 Describe different forms in which texts may be presented
- 1.3 Explain the difference between producing text from own notes and producing text from others' notes

### Outcome 2: Understand the purpose and benefits of following procedures when preparing text using touch typing

#### Assessment Criteria

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts
- 2.2 Explain the benefits of accuracy – including spelling, grammar and punctuation – when preparing typed text from notes
- 2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
- 2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so
- 2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
- 2.6 Explain the purpose and benefits of meeting deadlines

### Outcome 3: Be able to prepare for tasks

#### Assessment Criteria

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

### Outcome 4: Be able to produce texts using touch typing at a minimum speed of 60 wpm

#### Assessment Criteria

The learner can:

- 4.1 Input texts using touch typing to a minimum speed of 60 words per minute
- 4.2 Format texts to agreed format making best use of available technology

- 4.3 Clarify text requirements when necessary
- 4.4 Read and check texts for accuracy
- 4.5 Edit and correct texts, as required
- 4.6 Store texts and original notes safely and securely following organisational procedures
- 4.7 Present texts to the required format and within the agreed deadlines

## Evidence requirements

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.3                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                       | 2.1 – 2.6                  |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
| 4.                       | 4.1 – 4.2<br>4.4 – 4.7     | 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"> <li>• documents produced</li> </ul>                         |
|                          | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |

**Level:** 3

**Credit value:** 8

**NDAQ number:** A/601/2533

### Unit aim

This unit is about preparing different types of text from shorthand notes at minimum speed of 80 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from shorthand
- 2 Understand the purpose and value of following procedures when preparing text from shorthand
- 3 Be able to prepare for tasks, and use shorthand to take dictation
- 4 Be able to produce texts from shorthand

### Guided learning hours

It is recommended that 45 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 BAD312.

### 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 task of preparing text from shorthand****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed
- 1.2 Describe different forms in which shorthand texts may be presented

**Outcome 2: Understand the purpose and value of following procedures when preparing text from shorthand****Assessment Criteria**

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts prepared from shorthand
- 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 2.3 Explain the purpose of storing text and original shorthand notes safely and securely, and ways of doing so
- 2.4 Explain the purpose of confidentiality and data protection when preparing text from shorthand notes
- 2.5 Explain the purpose and benefits of meeting deadlines

**Outcome 3: Be able to prepare for tasks, and use shorthand to take dictation****Assessment Criteria**

The learner can:

- 3.1 Agree the purpose, format, and deadlines for texts
- 3.2 Take dictation using shorthand at a minimum of 80 words per minute

**Outcome 4: Be able to produce texts from shorthand****Assessment Criteria**

The learner can:

- 4.1 Get clarification of points as required
- 4.2 Input and format texts to an agreed format from shorthand notes
- 4.3 Make efficient use of technology, as required
- 4.4 Read and check texts for accuracy

- 4.5 Edit and correct texts, as required
- 4.6 Store texts and original shorthand notes safely and securely following organisational procedures
- 4.7 Present texts to the required format, within the agreed deadlines

## 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 – 2.5           |   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 3.2                 | 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"> <li>• Shorthand notes</li> </ul>                            |
| 4.                | 4.1                 | Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts  |
|                   | 4.2 – 4.7           | 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"> <li>• documents produced</li> </ul>                         |



## Unit 315

## Prepare text from recorded audio instruction (60wpm)

**Level:** 3

**Credit value:** 4

**NDAQ number:** F/601/2534

### Unit aim

This unit is about preparing different types of text from audio recording at a minimum speed of 60 words per minute.

### Learning outcomes

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

The learner will:

- 1 Understand the task of preparing text from recorded audio instruction
- 2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction
- 3 Be able to produce texts from audio recordings

### 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 BAD314.

### 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 task of preparing text from recorded audio instruction****Assessment Criteria**

The learner can:

- 1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed
- 1.2 Describe different forms in which texts may be presented
- 1.3 Describe the different types of technology that are available for playing back recordings and their main features

**Outcome 2: Understand the purpose and value of following procedures when preparing text from recorded audio instruction****Assessment Criteria**

The learner can:

- 2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
- 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 2.3 Explain the purpose of storing text and original recordings safely and securely, and ways of doing so
- 2.4 Explain the purpose of confidentiality and data protection when preparing text from recorded audio
- 2.5 Explain the purpose and benefits of meeting deadlines

**Outcome 3: Be able to produce texts from audio recordings****Assessment Criteria**

The learner can:

- 3.1 Agree the purpose, format, and deadlines for texts prepared from audio recordings
- 3.2 Input text from an audio recordings at a minimum speed of 60 words per minute
- 3.3 Format texts to agreed format making best use of available technology
- 3.4 Clarify text requirements when necessary
- 3.5 Read and check texts for accuracy
- 3.6 Edit and correct texts, as required
- 3.7 Store texts and original recording safely and securely following organisational procedures
- 3.8 Present texts to the required format, within the agreed deadlines

## Evidence requirements

| Learning Outcomes | Assessment Criteria    | Assessment guidance   |
|-------------------|------------------------|---|
| 1.                | 1.1 – 1.3              | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1 – 2.5              |   |
| 3.                | 3.1<br>3.4             | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |
|                   | 3.2 – 3.3<br>3.5 – 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 from the following sources: <ul style="list-style-type: none"> <li>• documents produced</li> </ul>                         |

## 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.

**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<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• reports</li> <li>• notes of meetings</li> </ul> |
|                   | 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"> <li>• specification</li> </ul>  |

## 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<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>  |
|                   | 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"> <li>• training records</li> </ul>  |
|                   | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback</li> <li>• notes of meetings</li> </ul> |

**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 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                 |  |
| 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"> <li>• feedback obtained</li> </ul>   |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• data reported</li> </ul> |

**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**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 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 - 3.3                  |   |

|     |                  |  |  |
|-----|------------------|--|--|
| 4.  | 4.1<br>4.3 - 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"> <li>• information used</li> </ul>   |  |
|     | 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"> <li>• budgets</li> </ul>                                    |  |
|     | 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"> <li>• orders</li> <li>• delivery notes</li> </ul>   |  |
|     | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>   |  |
|     | 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"> <li>• contract</li> </ul>   |  |
|     | 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"> <li>• records of monitoring</li> </ul> |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |  |
| 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"> <li>• records of monitoring</li> </ul>  |  |
|     | 6.2              | Evidence may be supplied via candidate reports/reflective accounts and professional discussion   |  |



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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

**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 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                 |  |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• briefs</li> <li>• budgets</li> </ul> |

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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

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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 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 – 2.2                 |  |
| 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<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• event records</li> </ul>                     |
|                   | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budget</li> <li>• reconciliations</li> </ul> |



**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 Outcomes | Assessment Criteria     | Assessment guidance   |
|-------------------|-------------------------|---|
| 1.                | 1.1 – 1.17              | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 2.                | 2.1<br>2.4 – 2.6<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul> |

|    |           |   |
|----|-----------|---|
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budget</li> </ul>                           |
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• agenda</li> <li>• meeting papers</li> </ul> |
|    | 2.7       | 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. | 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  |
|    | 3.2 – 3.4 | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• meeting papers</li> </ul>                   |
| 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"> <li>• records</li> </ul>  |
|    | 4.3 – 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>   |
|    | 4.5 – 4.7 | 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"> <li>• evaluations</li> </ul>  |

## Unit 326

## Contribute to innovation in a business environment

**Level:** 3

**Credit value:** 4

**NDAQ number:** A/601/2547

### Unit aim

This unit is about making contributions to improving ways of working, products or services, by questioning, researching and actively developing ideas for new ways of working, products or services which can then be put forward as suggestions to decision-makers.

### 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 contribute 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 contribute to research and develop ideas
- 5 Be able to present suggestion 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 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 BAA112.

### 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 innovation in a business environment****Assessment Criteria**

The learner can:

- 1.1 Explain 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 in own area of work and assumptions about them

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

The learner can:

- 2.1 Explain the purpose of reviewing existing working methods, products or services
- 2.2 Explain ways of reviewing existing working methods, products or 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 benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so
- 2.7 Explain how to work with others to develop and agree an idea
- 2.8 Explain how to decide when an idea is, or is not possible
- 2.9 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 Describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome

## Outcome 4: Be able to contribute to research and develop ideas

### Assessment Criteria

The learner can:

- 4.1 Question constructively existing ways of working in own area of responsibility
- 4.2 Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility
- 4.3 Contribute to the collection of information that can be used to develop ideas for new approaches and solutions
- 4.4 Agree criteria for evaluating ideas including fit with organisational aims and objectives

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

### Assessment Criteria

The learner can:

- 5.1 Present and sell suggestions for 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 Contribute to the evaluation of ideas for new approaches and solutions using
  - a fit with organisational aims and objectives
  - b other agreed criteria
- 6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services
- 6.3 Contribute to the selling of ideas to others
- 6.4 Seek feedback on ideas, analyse feedback. and show a willingness to compromise
- 6.5 Contribute to the assessment of 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 – 2.9           |   |
| 3.                | 3.1 – 3.2           |   |
| 4.                | 4.1 – 4.4           | Evidence may be supplied via witness testimony, professional  |

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|    |           |  |
|----|-----------|--|
| 5. | 5.1 – 5.2 | 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 |  |

- letters
- emails
- memos
- minutes of meetings
- information collected
- feedback given
- reports
- presentations



**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**

| <b>Learning Outcomes</b> | <b>Assessment Criteria</b> | <b>Assessment guidance</b>  |
|--------------------------|----------------------------|---|
| 1.                       | 1.1 – 1.8                  | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning |
| 2.                       | 2.1 - 2.7                  |   |
| 3.                       | 3.1 – 3.3                  |   |

|    |                  |   |
|----|------------------|---|
| 4. | 4.1 – 4.2<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> </ul>                            |
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• specifications</li> </ul>                                 |
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• Critical path analysis</li> <li>• GANTT charts</li> </ul> |
|    | 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• risks identified</li> <li>• contingency plans</li> </ul>  |
| 5. | 5.1<br>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<br>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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> </ul>                            |

|    |            |  |
|----|------------|--|
|    | 5.3        | <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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• adapted plans</li> </ul> |
|    | 5.4<br>5.7 | <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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• reports</li> </ul>       |
| 6. | 6.1        | <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 from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> </ul>                          |
|    | 6.2 – 6.3  | <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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• reports</li> </ul>       |

## 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 Outcomes | Assessment Criteria | Assessment guidance   |
|-------------------|---------------------|---|
| 1.                | 1.1                 | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 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  |
| 8.                | 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:   |
|                   | 8.1 – 8.3           |   |
|                   |                     | <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>  |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback received</li> </ul> |

## 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 Outcomes | Assessment Criteria | Assessment guidance   |
|-------------------|---------------------|---|
| 1.                | 1.1                 | Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning   |
| 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  |
| 8.                | 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:   |
|                   | 8.1 – 8.3           |   |
|                   |                     | <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> </ul>  |
| 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"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback received</li> </ul> |

## 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 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           | 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: <ul style="list-style-type: none"> <li>• draft budget</li> </ul>              |
|                   | 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"> <li>• budget</li> </ul> |

## 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](http://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
- ***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<br>NOS<br>cate<br>gory | Core Business and Administration |     |     |     |     | Business Resources |     | Communications |     |     |     | Customer Service |     |     | Document Production |     |     |     |     | Events and Meetings |     |     |     | Innova<br>tion<br>and<br>Change | Manage Information and |     |     |
|----------------------------|----------------------------------|-----|-----|-----|-----|--------------------|-----|----------------|-----|-----|-----|------------------|-----|-----|---------------------|-----|-----|-----|-----|---------------------|-----|-----|-----|---------------------------------|------------------------|-----|-----|
|                            | 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<br>unit<br>no.        |                                  |     |     |     |     |                    |     |                |     |     |     |                  |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     |     |
| 201                        | ✓                                | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   | ✓              | ✓   | ✓   | ✓   | ✓                | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓                               | ✓                      | ✓   | ✓   |
| 202                        | ✓                                | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   | ✓              | ✓   | ✓   | ✓   | ✓                | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓                               | ✓                      | ✓   | ✓   |
| 203                        | ✓                                | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   | ✓              | ✓   | ✓   | ✓   | ✓                | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓                               | ✓                      | ✓   | ✓   |
| 205                        | ✓                                | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   | ✓              | ✓   | ✓   | ✓   | ✓                | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓                               | ✓                      | ✓   | ✓   |
| 206                        | ✓                                | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   | ✓              | ✓   | ✓   | ✓   | ✓                | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓                               | ✓                      | ✓   | ✓   |
| 211                        |                                  |     |     |     |     |                    |     |                |     |     |     |                  | ✓   |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     |     |
| 217                        |                                  |     |     |     |     |                    |     |                |     |     |     |                  |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        | ✓   |     |
| 219                        |                                  |     |     |     |     |                    |     |                |     |     |     |                  |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     | ✓   |
| 220                        |                                  |     |     |     |     |                    |     |                |     |     |     |                  |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     |     |
| 227                        | ✓                                |     |     |     |     |                    |     |                |     |     |     |                  |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     |     |
| 229                        |                                  |     |     |     |     |                    |     |                |     |     |     | ✓                |     |     |                     |     |     |     |     |                     |     |     |     |                                 |                        |     |     |

### Level 3 units

| CfA NOS category | Core Business and Administration |     |     |     |     |     |     |     |     | Business Resources | Business Support Services | Communications |     |     | Customer Service |     | Document Production |     |     |     |     | Events and Meetings |     |     |     |     | Innovation and Change | Manage Information and Data |     |     |     | Project Management |
|------------------|----------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|--------------------|---------------------------|----------------|-----|-----|------------------|-----|---------------------|-----|-----|-----|-----|---------------------|-----|-----|-----|-----|-----------------------|-----------------------------|-----|-----|-----|--------------------|
|                  | 301                              | 302 | 303 | 305 | 306 | 307 | 308 | 309 | 319 |                    |                           | 330            | 325 | 304 | 310              | 311 | 328                 | 329 | 312 | 313 | 314 | 315                 | 320 | 321 | 322 | 323 |                       | 324                         | 326 | 316 | 317 |                    |
| 4428 unit no.    |                                  |     |     |     |     |     |     |     |     |                    |                           |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     |     |                    |
| 301              | ✓                                |     | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓                         | ✓              | ✓   | ✓   | ✓                | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                     | ✓                           | ✓   | ✓   | ✓   |                    |
| 302              | ✓                                | ✓   |     | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓                  |                           | ✓              | ✓   | ✓   | ✓                | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                     | ✓                           | ✓   | ✓   | ✓   |                    |
| 303              | ✓                                | ✓   |     | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓                  |                           | ✓              | ✓   | ✓   | ✓                | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                     | ✓                           | ✓   | ✓   | ✓   |                    |
| 304              |                                  |     |     |     |     |     |     |     |     |                    |                           |                | ✓   | ✓   |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     |     |                    |
| 305              |                                  |     |     |     |     |     | ✓   | ✓   |     | ✓                  | ✓                         |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     | ✓                     | ✓                           | ✓   | ✓   | ✓   |                    |
| 306              | ✓                                | ✓   | ✓   | ✓   |     |     | ✓   | ✓   | ✓   | ✓                  | ✓                         | ✓              | ✓   | ✓   | ✓                | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                   | ✓   | ✓   | ✓   | ✓   | ✓                     | ✓                           | ✓   | ✓   | ✓   |                    |
| 307              |                                  |     |     | ✓   |     |     | ✓   | ✓   | ✓   |                    |                           |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     | ✓                     |                             |     |     | ✓   |                    |
| 308              |                                  |     |     |     |     |     |     | ✓   |     | ✓                  |                           |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     | ✓   |                    |
| 309              |                                  |     |     |     | ✓   |     |     |     |     |                    | ✓                         |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     | ✓   |                    |
| 310              |                                  |     |     |     |     |     |     |     |     |                    |                           | ✓              |     | ✓   |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     |     |                    |
| 311              |                                  |     |     |     |     |     |     |     |     |                    |                           | ✓              | ✓   |     |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     |     |                    |
| 317              |                                  |     |     |     |     |     |     |     |     |                    |                           |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     | ✓                     |                             |     |     |     |                    |
| 328              |                                  |     |     |     |     |     |     |     |     |                    | ✓                         |                |     |     |                  |     |                     |     |     |     |     |                     |     |     |     |     |                       |                             |     |     |     |                    |

## Level 4 units

| CfA NOS category | Core Business and Administration |     |     |     |     |     |     |     | Business Resources |     | Business Support Services |     | Communications | Events and Meetings | Innovation and Change |     | Manage Information and Data |     |
|------------------|----------------------------------|-----|-----|-----|-----|-----|-----|-----|--------------------|-----|---------------------------|-----|----------------|---------------------|-----------------------|-----|-----------------------------|-----|
|                  | 401                              | 402 | 403 | 404 | 405 | 407 | 408 | 409 | 412                | 420 | 415                       | 417 | 406            | 413                 | 418                   | 419 | 410                         | 411 |
| 4482 unit no.    |                                  |     |     |     |     |     |     |     |                    |     |                           |     |                |                     |                       |     |                             |     |
| 401              |                                  | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   |                           |     | ✓              | ✓                   | ✓                     | ✓   | ✓                           | ✓   |
| 402              | ✓                                |     | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓                  | ✓   |                           |     | ✓              | ✓                   | ✓                     | ✓   | ✓                           | ✓   |
| 403              |                                  |     |     | ✓   |     |     | ✓   | ✓   | ✓                  | ✓   |                           |     | ✓              | ✓                   | ✓                     |     |                             |     |
| 404              |                                  |     |     |     |     |     |     |     |                    |     |                           |     |                |                     |                       |     |                             |     |
| 405              |                                  |     |     |     |     |     |     |     |                    |     |                           |     |                |                     |                       |     |                             |     |
| 407              |                                  |     |     |     | ✓   |     | ✓   | ✓   | ✓                  | ✓   |                           |     |                |                     | ✓                     | ✓   | ✓                           | ✓   |
| 408              |                                  |     |     |     | ✓   | ✓   |     | ✓   | ✓                  | ✓   |                           |     |                |                     | ✓                     | ✓   |                             |     |
| 409              |                                  |     |     |     |     |     |     |     | ✓                  | ✓   |                           |     |                |                     |                       | ✓   |                             |     |
| 410              |                                  |     |     |     |     |     |     |     |                    |     |                           |     |                |                     |                       |     |                             | ✓   |
| 411              |                                  |     |     |     |     |     |     |     |                    |     |                           |     |                |                     |                       |     | ✓                           |     |
| 415              |                                  |     |     |     |     |     |     |     |                    |     |                           | ✓   |                |                     |                       |     |                             |     |
| 417              |                                  |     |     |     |     |     |     |     |                    |     | ✓                         |     |                |                     |                       |     |                             |     |
| 420              |                                  |     |     |     |     |     |     |     | ✓                  |     |                           |     |                |                     |                       |     |                             |     |

## Level 5 units

| <b>CfA NOS<br/>category</b> | <b>Innovation and<br/>Change</b> |     |
|-----------------------------|----------------------------------|-----|
| 4428 unit no.               | 503                              | 504 |
| 503                         |                                  | ✓   |
| 504                         | ✓                                |     |

## Useful contacts

| Type                          | Contact  | Query   |
|-------------------------------|--|---|
| UK learners                   | T: +44 (0) 844 543 0033<br>E: learnersupport@cityandguilds.com   | <ul style="list-style-type: none"> <li>• General qualification information</li> </ul>   |
| International learners        | T: +44 (0)20 7294 2885<br>F: +44 (0)20 7294 2413<br>E: intcg@cityandguilds.com   | <ul style="list-style-type: none"> <li>• General qualification information</li> </ul>   |
| Centres                       | T: +44(0) 844 543 0000<br>F: +44 (0)20 7294 2413<br>E: centresupport@cityandguilds.com                                       | <ul style="list-style-type: none"> <li>• Exam entries</li> <li>• Registrations/enrolment</li> <li>• Certificates</li> <li>• Invoices</li> <li>• Missing or late exam materials</li> <li>• Nominal roll reports</li> <li>• Results</li> </ul>                              |
| Single subject qualifications | T: +44 (0)20 7294 8080<br>F: +44 (0)20 7294 2413<br>F: +44 (0)20 7294 2404 (BB forms)<br>E: singlesubjects@cityandguilds.com | <ul style="list-style-type: none"> <li>• Exam entries</li> <li>• Results</li> <li>• Certification</li> <li>• Missing or late exam materials</li> <li>• Incorrect exam papers</li> <li>• Forms request (BB, results entry)</li> <li>• Exam date and time change</li> </ul> |
| International awards          | T: +44 (0)20 7294 2885<br>F: +44 (0)20 7294 2413<br>E: intops@cityandguilds.com  | <ul style="list-style-type: none"> <li>• Results</li> <li>• Entries</li> <li>• Enrolments</li> <li>• Invoices</li> <li>• Missing or late exam materials</li> <li>• Nominal roll reports</li> </ul>  |
| Walled Garden                 | T: +44 (0)20 7294 2840<br>F: +44 (0)20 7294 2405<br>E: walledgarden@cityandguilds.com  | <ul style="list-style-type: none"> <li>• Re-issue of password or username</li> <li>• Technical problems</li> <li>• Entries</li> <li>• Results</li> <li>• GOLLA</li> <li>• Navigation</li> <li>• User/menu option problems</li> </ul>                                      |
| Employer                      | T: +44 (0)121 503 8993<br>E: business_unit@cityandguilds.com   | <ul style="list-style-type: none"> <li>• Employer solutions</li> <li>• Mapping</li> <li>• Accreditation</li> <li>• Development Skills</li> <li>• Consultancy</li> </ul>   |
| Publications                  | T: +44 (0)20 7294 2850<br>F: +44 (0)20 7294 3387   | <ul style="list-style-type: none"> <li>• Logbooks</li> <li>• Centre documents</li> <li>• Forms</li> <li>• Free literature</li> </ul>  |

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: [feedbackandcomplaints@cityandguilds.com](mailto:feedbackandcomplaints@cityandguilds.com)

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