



City & Guilds Level 2 NVQ Certificate in Business and Administration (4428-02)

Version 2.4 (September 2024)

Qualification Handbook

Qualification at a glance

Subject area	Administration
City & Guilds number	4428
Age group approved	Learners aged 14 or above
Entry requirements	City & Guilds does not set entry requirements for these qualifications
Assessment	Portfolio of evidence
Grading	Pass/Fail
Approvals	Full approval required
Support materials	Recording forms, Learning Assistant, Smartscreen
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds qualification number	Regulatory reference number	GLH	TQT
City & Guilds Level 2 NVQ Certificate in Business and Administration	4428-02	500/9677/1	81	210

Version and date	Change detail	Section
1.0 August 2010	Initial version	All
1.4 Nov 2012	Additional units added to rules of combination	Qualification Structure (Page 6)
V2.0 June 2020	Amended table	Introduction to the qualifications (Page 6)
V2.0 June 2020	Added 'Total Qualification Time' section	Qualification Structure (Page 10)
V2.1 June 2021	Unit 231 'Administer the recruitment and selection process', renumbered assessment criteria in outcome 3.	Page 132
V2.2 March 2022	GLH and TQT clarified and highlighted	Throughout
V2.3 Dec 2022	Certificate GLH corrected.	Qualification structure
V2.4 Sept 2024	Handbook reviewed and updated to new template Award & Diploma removed	Throughout Assessment

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1 Introduction

This document tells you what you need to do to deliver the qualifications

Area	Description
Who are the qualifications for?	This qualification is for those individuals who wish to work or are already employed in, an administrative role. It will enable the young or adult learner to develop a solid understanding of how to work and communicate in any business environment. This qualification gives them the opportunity to develop a broad skill set that will facilitate progression in the workplace and/or onto further learning and training.
What do the qualifications cover?	The Level 2 NVQ Certificate allows learners 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.
What opportunities for progression are there?	On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications: <ul style="list-style-type: none">• City & Guilds Level 3 NVQ Certificate/Diploma in Business and Administration (4428-03/93)• City & Guilds Level 3 NVQ Diploma in Customer Service (4430)• City & Guilds Level 3 Certificate/Diploma for Legal Secretaries (7465)*• City & Guilds Level 3 Certificate in Medical Administration / Diploma for Medical Secretaries (4419)*• City & Guilds Level 3 Advanced Apprenticeship in Business and Administration (9050)*

Area	Description
Who did we develop the qualifications with?	This qualification is based on national occupational standards developed by the Council for Administration (CfA) and was designed in collaboration with City & Guilds and other awarding organisations. CfA has now become Instructus Skills (since 2017). It includes imported units from e-Skills now the Tech Partnership and the Institute of Customer Service (ICS).
Is it part of an apprenticeship framework or initiative?	The Level 2 NVQ Certificate is a component of the level 2 Apprenticeship in Business and Administration framework.

*This qualification has been withdrawn and is no longer available for new candidate registrations. For more details regarding this, please contact City & Guilds directly.

Structure

To achieve the City & Guilds Level 2 NVQ Certificate in Business and Administration, learners 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)

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
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Mandatory units:

Group A

4428-201	F/601/2467	Manage own performance in a business environment	2	2	9	
4428-202	L/601/2469	Improve own performance in a business environment	2	2	6	
4428-203	F/601/2470	Work in a business environment	2	2	18	
4428-204	D/601/2475	Communicate in a business environment	2	3	18	

Optional units:

Group B

4428-107	K/601/2446	Make and receive telephone calls	1	3	10	
4428-205	L/601/2472	Solve business problems	2	4	12	

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-206	Y/601/2474	Work with other people in a business environment	2	3	10	
4428-207	H/601/2476	Use electronic message systems	2	1	6	
4428-208	K/601/2477	Use a diary system	2	3	9	
4428-209	M/601/2478	Take minutes	2	4	15	
4428-210	T/601/2479	Handle mail	2	3	17	
4428-211	K/601/2480	Provide reception services	2	3	15	229
4428-212	T/601/2482	Produce documents in a business environment	2	4	15	312
4428-213	A/601/2483	Prepare text from notes	2	3	15	214, 313
4428-214	F/601/2484	Prepare text from notes using touch typing (40 wpm)	2	3	15	213, 313
4428-215	J/601/2485	Prepare text from shorthand (60 wpm)	2	8	55	314
4428-216	L/601/2486	Prepare text from recorded audio instruction (40 wpm)	2	4	35	315
4428-217	R/601/2487	Organise and report data	2	3	12	
4428-218	Y/601/2488	Research information	2	4	17	
4428-219	R/601/2490	Store and retrieve information	2	3	17	
4428-220	Y/601/2491	Archive information	2	2	13	
4428-221	H/601/2493	Use office equipment	2	4	18	

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-222	M/601/2495	Maintain and issue stationery stock items	2	3	14	
4428-223	L/601/2505	Support the organisation of an event	2	2	15	320
4428-224	D/601/2508	Support the co-ordination of an event	2	3	20	321
4428-225	Y/601/2510	Support the organisation of business travel or accommodation	2	3	18	
4428-226	T/601/2515	Support the organisation of meetings	2	4	18	322
4428-227	F/601/2517	Respond to change in a business environment	2	3	16	
4428-228	J/601/2518	Support the management and development of an information system	2	7	40	
4428-229	Y/601/2457	Meet and welcome visitors	2	3	23	211
4428-230	T/601/2790	Administer human resource records	2	3	20	
4428-231	A/601/2791	Administer the recruitment and selection process	2	4	30	
4428-243	J/601/2647	Administer parking dispensations	2	4	14	
4428-250	M/503/8617	Building working relationships with other from different countries and diverse cultures	2	2	20	

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-252	Y/600/8893	Payroll Processing	2	3	13	
4428-253	F/601/8320	Processing customers' financial transactions	2	4	8	
4428-310	M/601/2528	Develop a presentation	3	3	15	
4428-311	T/601/2529	Deliver a presentation	3	3	15	
4428-312	M/601/2531	Design and produce documents in a business environment	3	4	25	212
4428-313	T/601/2532	Prepare text from notes using touch typing (60 wpm)	3	4	10	214
4428-314	A/601/2533	Prepare text from shorthand (80 wpm)	3	8	45	215
4428-315	F/601/2534	Prepare text from recorded audio instruction (60wpm)	3	4	25	216
4428-316	L/601/2536	Support the design and development of an information system	3	7	35	
4428-317	R/601/2537	Monitor information systems	3	7	30	
4428-318	Y/601/2538	Analyse and report data	3	6	30	
4428-319	D/601/2539	Order products and services	3	5	35	
4428-320	R/601/2540	Plan and organise an event	3	4	28	223
4428-321	Y/601/2541	Co-ordinate an event	3	4	30	224

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-322	D/601/2542	Plan and organise meetings	3	5	25	226
4428-326	A/601/2547	Contribute to innovation in a business environment	3	4	30	
4428-327	J/601/2549	Contribute to running a project	3	5	30	
4428-328	A/601/2550	Deliver, monitor and evaluate customer service to internal customers	3	3	12	
4428-329	F/601/2551	Deliver, monitor and evaluate customer service to external customers	3	3	12	
4428-330	J/601/2552	Agree a budget	3	4	25	
4428-344	H/601/7791	Administer legal files	3	7	25	
4428-345	K/601/7792	Build case files	3	4	20	
4428-346	M/601/7793	Manage case files	3	5	25	
4428-347	D/601/7787	Provide administrative support in schools	3	8	53	
4428-348	L/601/2648	Administer parking and traffic challenges, representations and civil parking appeals	3	9	40	
4428-349	R/601/2649	Administer statutory parking and traffic appeals	3	9	45	

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-350	J/601/2650	Administer parking and traffic debt recovery	3	9	54	
4428-357	T/601/8282	Support Individuals with specific communication needs	3	5	35	

Optional units:

Group C

4428-112	T/601/2465	Use occupational health and safety guidelines when using keyboards	1	2	20	
4428-113	J/502/4299	Using email	1	2	15	254
4428-114	L/502/4627	Word processing software	1	3	20	242
4428-115	A/502/4395	Bespoke software	1	2	15	232
4428-116	F/502/4558	Data management software	1	2	15	233
4428-117	H/502/4553	Database software	1	3	20	234
4428-118	T/502/4153	Improving productivity using IT	1	3	20	235
4428-119	R/502/4256	IT security for users	1	1	10	236
4428-120	K/502/4621	Presentation software	1	3	20	237
4428-121	Y/502/4209	Set up an IT system	1	3	20	238
4428-122	A/502/4624	Spreadsheet software	1	3	20	239
4428-123	A/502/4378	Using collaborative technologies	1	3	20	240
4428-124	L/502/4630	Website software	1	3	20	241

City & Guilds unit number	Unit accreditation number	Unit title	Level	Credit	GLH	Excluded combination*
4428-232	F/502/4396	Bespoke software	2	3	20	115
4428-233	J/502/4559	Data management software	2	3	20	116
4428-234	M/502/4555	Database software	2	4	30	117
4428-235	J/502/4156	Improving productivity using IT	2	4	30	118
4428-236	Y/502/4257	IT security for users	2	2	15	119
4428-237	M502/4622	Presentation software	2	4	30	120
4428-238	L/502/4210	Set up an IT system	2	4	30	121
4428-239	F/502/4625	Spreadsheet software	2	4	30	122
4428-240	F/502/4379	Using collaborative technologies	2	4	30	123
4428-241	R/502/4631	Website software	2	4	30	124
4428-242	R/502/4628	Word processing software	2	4	30	114
4428-251	Y/600/9011	Ensure your own actions reduce risks to health and safety	2	4	30	
4428-254	M/502/4300	Using email	2	3	20	113

* Excluded combination – indicated unit(s) cannot be taken together within the qualification

Total Qualification Time (TQT)

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT comprises of the following two elements:

- 1) the number of hours that an awarding organisation has assigned to a qualification for guided learning
- 2) an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Title and level	GLH	TQT
City & Guilds Level 2 NVQ Certificate in Business and Administration	81	210

2 Centre requirements

Approval

Full approval

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the document **Centre Approval Process: Quality Assurance Standards** for further information.

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

Resource requirements

Centre staffing

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

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

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 quality assurance, and that it takes account of any national or legislative developments.

Quality assurance

Approved centres must have effective quality assurance systems to ensure optimum delivery and assessment of qualifications. Quality assurance includes initial centre approval, qualification approval and the centre's own internal procedures for monitoring quality. Centres are responsible for internal quality assurance and City & Guilds is responsible for external quality assurance. All external quality assurance processes reflect the minimum requirements for verified and moderated assessments, as detailed in the Centre Assessment Standards Scrutiny (CASS), section H2 of Ofqual's General Conditions. For more information on both CASS and City and Guilds Quality Assurance processes visit: the [What is CASS?](#) and [Quality Assurance Standards](#) documents on the City & Guilds website.

Standards and rigorous quality assurance are maintained by the use of:

- Internal quality assurance
- City & Guilds external quality assurance.

In order to carry out the quality assurance role, Internal Quality Assurers must

- have appropriate teaching and vocational knowledge and expertise
- have experience in quality management/internal quality assurance
- hold or be working towards an appropriate teaching/training/assessing qualification
- be familiar with the occupation and technical content covered within the qualification.

External quality assurance for the qualification will be provided by City & Guilds EQA process. EQAs are appointed by City & Guilds to approve centres, and to monitor the assessment and internal quality assurance carried out by centres. External quality assurance is carried out to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

The role of the EQA is to:

- provide advice and support to centre staff
- ensure the quality and consistency of assessments and marking/grading within and between centres by the use of systematic sampling
- provide feedback to centres and to City & Guilds.

Learner entry requirements

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is approved for learners aged 14 or above.

Access arrangements and reasonable adjustments

City & Guilds has considered the design of this qualification and its assessments in order to best support accessibility and inclusion for all learners. We understand however that individuals have diverse learning needs and may require reasonable adjustments to fully participate. Reasonable adjustments, such as additional time or alternative formats, may be provided to accommodate learners with disabilities and support fair access to assessment.

Access arrangements are adjustments that allow candidates with disabilities, special educational needs, and temporary injuries to access the assessment and demonstrate their skills and knowledge without changing the demands of the assessment. These arrangements must be made before assessment takes place.

Equality legislation requires City & Guilds to make reasonable adjustments where a disabled person would be at a substantial disadvantage in undertaking an assessment.

It is the responsibility of the centre to ensure at the start of a programme of learning that candidates will be able to access the requirements of the qualification.

Please refer to the Joint Council for Qualifications (JCQ) access arrangements and reasonable adjustments and access arrangements – when and how applications need to be made to City & Guilds. For more information documents are available on the City & Guilds website.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs
- support and guidance they may need when working towards their qualification
- any units they have already completed or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification, their responsibilities as a learner and the responsibilities of the centre. This information can be recorded on a learning contract.

Inclusion and diversity

City & Guilds is committed to improving inclusion and diversity within the way we work and how we deliver our purpose which is to help people and organisations develop the skills they need for growth.

More information and guidance to support centres in supporting inclusion and diversity through the delivery of City & Guilds qualifications can be found here:

[Inclusion and diversity | City & Guilds \(cityandguilds.com\)](https://www.cityandguilds.com)

Sustainability

City & Guilds are committed to net zero. Our ambition is to reduce our carbon emissions by at least 50% before 2030 and develop environmentally responsible operations to achieve net zero by 2040 or sooner if we can. City & Guilds is committed to supporting qualifications that support our customers to consider sustainability and their environmental footprint.

More information and guidance to support centres in developing sustainable practices through the delivery of City & Guilds qualifications can be found here:

[Our Pathway to Net Zero | City & Guilds \(cityandguilds.com\)](https://www.cityandguilds.com)

Centres should consider their own carbon footprint when delivering this qualification and consider reasonable and practical ways of delivering this qualification with sustainability in mind. This could include:

- reviewing purchasing and procurement processes (such as buying in bulk to reduce the amount of travel time and energy, considering and investing in the use of components that can be reused, instead of the use of disposable or single use consumables)
- reusing components wherever possible

- waste procedures (ensuring that waste is minimised, recycling of components is in place wherever possible)
- minimising water use and considering options for reuse/salvage as part of plumbing activities wherever possible.

Performance at Work

To be awarded a 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'¹.

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

Realistic work environments

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

- time pressures
- work problems
- interruptions
- accountabilities
- office environment
- tools to do the job.
e.g. a candidate in a model or virtual office.

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

Simulation

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

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

- 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.

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

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. See, CfA Assessment Strategy 2009, Business & Administration NOS, December 2009. (CfA has now become Instructus Skills (since 2017).)

Support materials

The following resources are available for these qualifications:

Description	How to access
Recording forms	www.cityandguilds.com
Learning Assistant	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence for each unit
- for imported ITQ units the City & Guilds 7574 assignments are an acceptable alternative method of assessment.

To use with these imported ITQ units City & Guilds has written the following assessments/assignments:

- Assignments and assignment guidance for imported ITQ units that can be downloaded from the City & Guilds website (7574 qualification pages)
- Sample assignments can also be downloaded from the 7574 sections on SmartScreen.

If a centre chooses to use a Portfolio of Evidence rather than the ITQ assignments for those ITQ units prior approval from the EQA should be obtained.

Assessment strategy

All units are assessed through a portfolio of evidence. All evidence in the portfolio for the skills learning outcomes must be generated in the workplace or a realistic working environment.

For the imported ITQ units the IT User Assessment Strategy says “All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.”

Portfolio of evidence

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

City & Guilds endorses several ePortfolio systems, including our own, **Learning Assistant**, an easy-to-use and secure online tool to support and evidence candidates’ progress towards achieving qualifications. Further details are available at www.cityandguilds.com/eportfolios.

City & Guilds has developed a set of **recording forms** including examples of completed forms for new and existing centres to use as appropriate. Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external quality assurers, 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.

Evidence sources

A portfolio of evidence will typically include several pieces of evidence – it must contain sufficient evidence to demonstrate the knowledge and skills required for each appropriate unit.

Evidence sources may include:

- training logbooks
- centre-produced worksheets and activities
- annotated photographs
- video clips (maximum duration in total = 10 minutes)
- workplace documentation/records, for example job cards/job sheets, equipment check/maintenance/service records, parts order records.

This is not a definitive list; other evidence sources are permitted.

The evidence provided must be valid and attributable to the candidate; the portfolio of evidence must contain a statement from the centre confirming this.

Evidence **must not** include:

- any methods of self-assessment
- any employer contributions should focus on direct observation of evidence (for example witness statements) of competence rather than opinions.

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 assignments to assess the imported ITQ units.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

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

Please refer to the relevant Assessment Strategy for guidance on RPL 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 and the 4428 Additional Units document from www.cityandguilds.com

Structure of the units

These units each have the following:

- City & Guilds reference number
- Unit Accreditation Number (UAN)
- title
- level
- guided learning hours (GLH)
- credit value
- unit aim
- assessment type
- learning outcomes, which comprise a number of assessment criteria
- range statements and/or evidence requirements
- supporting information
- relationship to NOS/mapping to occupational/apprenticeship standards.

Guidance for delivery of the units

This qualification comprises a number of **units**. A unit describes what is expected of a competent person in particular aspects of their job.

Each **unit** is divided into **learning outcomes** which describe in further detail the skills and knowledge that a candidate should possess.

Each **learning outcome** has a set of **assessment criteria** (performance and knowledge and understanding) which specify the desired criteria that must be satisfied before an individual can be said to have performed to the agreed standard.

Range statements define the breadth or scope of a learning outcome and its assessment criteria by setting out the various circumstances in which they are to be applied.

Supporting information provides guidance of the evidence requirement for the unit and specific guidance on delivery and range statements. Centres are advised to review this information carefully before delivering the unit.

Unit 107

Make and receive telephone calls

UAN:	K/601/2446
Level:	1
GLH:	10
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA621.
Endorsement by sector body	This unit has been developed by the Council for Administration
Aim:	This unit is about making and receiving telephone calls, and transferring calls when necessary, in a business environment.

Learning outcome

The learner will:

LO1 Understand how to make telephone calls

Assessment criteria

The learner can:

- AC1.1 Describe the different features of telephone systems and how to use them
- AC1.2 Give reasons for identifying the purpose of a call before making it
- AC1.3 Describe different ways of obtaining the names and numbers of people that need to be contacted
- AC1.4 Describe how to use a telephone system to make contact with people inside and outside an organisation
- AC1.5 Explain the purpose of giving a positive image of self and own organisation
- AC1.6 Explain the purpose of summarising the outcomes of a telephone conversation before ending the call
- AC1.7 Describe how to identify problems and who to refer them to
- AC1.8 Describe organisation structures and communication channels within an organisation
- AC1.9 Describe how to follow organisational procedures when making a telephone call
- AC1.10 Explain how to report telephone system faults

Learning outcome

The learner will:

LO2 Understand how to receive and transfer telephone calls

Assessment criteria

The learner can:

- AC2.1 Describe how to identify callers and their needs
- AC2.2 Explain the purpose of giving accurate and up to date information to callers
- AC2.3 Explain the purpose of confidentiality and security when dealing with callers
- AC2.4 Describe the types of information that could affect confidentiality and security and how to handle these
- AC2.5 Describe ways of identifying the appropriate person to whom a call is transferred
- AC2.6 Describe the information to be given when transferring calls or leaving messages
- AC2.7 Describe how to identify problems and who to refer them to
- AC2.8 Describe how to follow organisational procedures when receiving a telephone call
- AC2.9 Explain how to report telephone system faults

Learning outcome

The learner will:

LO3 Be able to make telephone calls

Assessment criteria

The learner can:

- AC3.1 Identify the purpose of the call
- AC3.2 Obtain the name and number of the person to be contacted
- AC3.3 Make contact with the person
- AC3.4 Communicate information to achieve the purpose of the call
- AC3.5 Project a positive image of self and organisation
- AC3.6 Summarise the outcomes of the conversation before ending a call
- AC3.7 Report telephone system faults, if necessary

Learning outcome

The learner will:

LO4 Be able to receive telephone calls

Assessment criteria

The learner can:

- AC4.1 Answer a phone following organisational procedures
- AC4.2 Give a positive image of self and organisation
- AC4.3 Identify the caller, where they are calling from, and what they need

- AC4.4 Give accurate and up to date information whilst protecting confidentiality and security
- AC4.5 Transfer calls, if required
- AC4.6 Take and pass on messages according to the caller's needs
- AC4.7 Summarise the outcomes of the conversation before ending the call
- AC4.8 Report telephone system faults, if necessary

Unit 107

Make and receive telephone calls

Supporting information

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">• telephone logs
	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">• memos• emails• telephone logs
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">• telephone logs• messages
	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: <ul style="list-style-type: none">• memos• emails• telephone logs

Unit 112

Use occupational health and safety guidelines when using keyboards

UAN:	T/601/2465
Level:	1
GLH:	20
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAE141.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance

Learning outcome

The learner will:

- LO1 Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance

Assessment criteria

The learner can:

- AC1.1 State occupational health and safety guidelines in relation to using keyboards
AC1.2 Explain the purpose of following occupational health and safety guidelines for using keyboards
AC1.3 Describe how to position fingers, wrists, forearms and back in relation to the equipment being used
AC1.4 Describe procedures for workstation care and maintenance

Learning outcome

The learner will:

LO1 Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance

Assessment criteria

The learner can:

- AC2.1 Demonstrate correct positioning of fingers, wrists, forearms and back in relation to the equipment being used
- AC2.2 Follow procedures for workstation care and maintenance
- AC2.3 Follow occupational health and safety guidelines for using keyboards
- AC2.4 Use techniques to prevent repetitive strain syndrome in accordance with occupational health and safety guidelines

Unit 112

Use occupational health and safety guidelines when using keyboards

Supporting information

Evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1.	1.1–1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1–2.4	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

UAN:	F/601/2467
Level:	2
GLH:	9
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA625.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about managing and being accountable for your own work.

Learning outcome

The learner will:

LO1 Understand how to plan work and be accountable to others

Assessment criteria

The learner can:

- AC1.1 Outline guidelines, procedures codes of practice relevant to personal work
- AC1.2 Explain the purpose of planning work, and being accountable to others for own work
- AC1.3 Explain the purpose and benefits of agreeing realistic targets for work
- AC1.4 Explain how to agree realistic targets
- AC1.5 Describe ways of planning work to meet agreed deadlines
- AC1.6 Explain the purpose of keeping other people informed about progress
- AC1.7 Explain the purpose and benefits of letting other people know work plans need to be changed
- AC1.8 Describe types of problems that may occur during work
- AC1.9 Describe ways of seeking assistance with getting help to resolve problems
- AC1.10 Explain the purpose and benefits of recognising and learning from mistakes

Learning outcome

The learner will:

LO2 Understand how to behave in a way that supports effective working

Assessment criteria

The learner can:

- AC2.1 Explain the purpose and benefits of agreeing and setting high standards for own work
- AC2.2 Describe ways of setting high standards for work
- AC2.3 Explain the purpose and benefits of taking on new challenges if they arise
- AC2.4 Explain the purpose and benefits of adapting to change
- AC2.5 Explain the purpose and benefits of treating others with honesty, respect and consideration
- AC2.6 Explain why own behaviour in the workplace is important
- AC2.7 Describe types of behaviour at work that show honesty, respect and consideration and those that do not

Learning outcome

The learner will:

LO3 Be able to plan and be responsible for own work, supported by other

Assessment criteria

The learner can:

- AC3.1 Agree realistic targets and achievable timescales for own work
- AC3.2 Plan work tasks to make best use of own time and available resources
- AC3.3 Confirm effective working methods with others
- AC3.4 Identify and report problems occurring in own work, using the support of other people when necessary
- AC3.5 Keep other people informed of progress
- AC3.6 Complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time
- AC3.7 Take responsibility for own work and accept responsibility for any mistakes made
- AC3.8 Follow agreed work guidelines, procedures and, where needed, codes of practice

Learning outcome

The learner will:

LO4 Behave in a way that supports effective working

Assessment criteria

The learner can:

- AC4.1 Set high standards for own work and show commitment to achieving these standards

- AC4.2 Agree to take on new challenge(s) if they arise
- AC4.3 Adapt to new ways of working
- AC4.4 Treat other people with honesty, respect and consideration
- AC4.5 Help and support other people in work tasks

Unit 201

Manage own performance in a business environment

Supporting information

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">• appraisals• performance reviews• letters• emails• memos• messages• minutes of meetings• to do lists• work diaries• action plans
	3.6	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: <ul style="list-style-type: none">• appraisals• performance reviews• letters• emails• memos• messages• to do lists• work diaries• action plans

Learning outcomes	Assessment criteria	Assessment guidance
	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"> • appraisals • performance reviews • letters • emails • memos • messages
	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"> • appraisals • performance reviews
4.	4.1 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"> • appraisals • performance reviews
	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"> • appraisals • performance reviews • letters • emails • memos • messages • minutes of meetings • to do lists • work diaries • action plans

Learning outcomes**Assessment criteria****Assessment guidance**

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

UAN:	L/601/2469
Level:	2
GLH:	6
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA625.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how to improve own performance

Assessment criteria

The learner can:

- AC1.1 Explain the purpose and benefits of continuously improving performance at work
- AC1.2 Explain the purpose and benefits of encouraging and accepting feedback from others
- AC1.3 Explain how learning and development can improve own work, benefit organisations, and identify career options
- AC1.4 Describe possible career progression routes
- AC1.5 Describe possible development opportunities

Learning outcome

The learner will:

LO2 Be able to improve own performance using feedback

Assessment criteria

The learner can:

- AC2.1 Encourage and accept feedback from other people
 - AC2.2 Use feedback to agree ways to improve own performance in the workplace
 - AC2.3 Complete work tasks, using feedback given, to improve performance
-

Learning outcome

The learner will:

LO3 Be able to agree own development needs using a learning plan

Assessment criteria

The learner can:

- AC3.1 Investigate and agree where further learning and development may improve own work performance
- AC3.2 Confirm learning plan changes
- AC3.3 Follow a learning plan
- AC3.4 Review progress against learning plan and agree further learning updates, if required

Unit 202

Improve own performance in a business environment

Supporting information

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 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">• letters• emails• memos
	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">• tasks completed
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Learning outcomes	Assessment criteria	Assessment guidance
3.2 3.4		<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • learning plan • appraisal • performance reviews
3.3		<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"> • learning plan

Unit 203

Work in a business environment

UAN:	F/601/2470
Level:	2
GLH:	18
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAF172.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how to respect other people at work

Assessment criteria

The learner can:

- AC1.1 Describe what is meant by diversity and why it should be valued
- AC1.2 Describe how to treat other people in a way that is sensitive to their needs
- AC1.3 Describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs
- AC1.4 Describe ways in which it is possible to learn from others at work

Learning outcome

The learner will:

LO2 Understand how to maintain security and confidentiality at work and deal with concerns

Assessment criteria

The learner can:

- AC2.1 Describe the purpose and benefits of maintaining security and confidentiality at work
 - AC2.2 Describe requirements for security and confidentiality in an organisation
 - AC2.3 Describe legal requirements for security and confidentiality, as required
 - AC2.4 Describe procedures for dealing with concerns about security and confidentiality in an organisation
-

Learning outcome

The learner will:

- LO3 Understand the purpose and procedures for keeping waste to a minimum in a business environment

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of keeping waste to a minimum
 - AC3.2 Describe the main causes of waste that may occur in a business environment
 - AC3.3 Describe ways of keeping waste to a minimum
 - AC3.4 Identify ways of using technology to reduce waste
 - AC3.5 Outline the purpose and benefits of recycling
 - AC3.6 Describe organisational procedures for recycling materials
-

Learning outcome

The learner will:

- LO4 Understand procedures for disposal of hazardous materials

Assessment criteria

The learner can:

- AC4.1 Describe the benefits of procedures for the recycling and disposal of hazardous materials
 - AC4.2 Describe organisational procedures for the recycling and disposal of hazardous materials
-

Learning outcome

The learner will:

- LO5 Know how to support sustainability in an organisation

Assessment criteria

The learner can:

- AC5.1 Outline the purpose of improving efficiency and minimising waste
- AC5.2 Describe ways of improving own working methods and use of technology to achieve efficiency and reduce waste
-

Learning outcome

The learner will:

LO6 Be able to respect and support other people at work in an organisation

Assessment criteria

The learner can:

- AC6.1 Complete work tasks alongside other people in a way that shows respect for
- a) backgrounds
 - b) abilities
 - c) values, customs and beliefs
- AC6.2 Complete work tasks with other people in a way that is sensitive to their needs
- AC6.3 Use feedback and guidance from other people to improve own way of working
- AC6.4 Follow organisational procedures and legal requirements in relation to discrimination legislation, as required
-

Learning outcome

The learner will:

LO7 Be able to maintain security and confidentiality

Assessment criteria

The learner can:

- AC7.1 Keep property secure, following organisational procedures and legal requirements, as required
- AC7.2 Keep information secure and confidential, following organisational procedures and legal requirements
- AC7.3 Follow organisational procedures to report concerns about security / confidentiality, as required
-

Learning outcome

The learner will:

LO8 Be able to support sustainability and minimise waste in an organisation

Assessment criteria

The learner can:

- AC8.1 Complete work tasks, keeping waste to a minimum
-

- AC8.2 Use technology in work task(s) in ways that minimise waste
- AC8.3 Follow procedures for recycling and disposal of hazardous materials, as required
- AC8.4 Follow procedures for the maintenance of equipment in own work

Unit 203

Work in a business environment

Supporting information

Evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1.	1.1–1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1–2.4	
3.	3.1–3.6	
4.	4.1–4.2	
5.	5.1–5.2	
6.	6.1–6.2 6.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	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">• minutes of meetings• memos• emails• appraisals• performance reviews
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	

Unit 204

Communicate in a business environment

UAN:	D/601/2475
Level:	2
GLH:	18
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA614.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about being able to communicate clearly and accurately, in writing and verbally, with other people in a business environment.

Learning outcome

The learner will:

LO1 Understand the purpose of planning communication

Assessment criteria

The learner can:

AC1.1 Explain reasons for knowing the purpose of communication

AC1.2 Explain reasons for knowing the audience to whom the communication is being presented

AC1.3 Describe different methods of communication

AC1.4 Describe when to use different methods of communication

Learning outcome

The learner will:

LO2 Understand how to communicate in writing

Assessment criteria

The learner can:

- AC2.1 Identify different sources of information that may be used when preparing written communication
 - AC2.2 Describe the communication principles for using electronic forms of written communication in a business environment
 - AC2.3 Describe the reasons for using language that suits the purpose of written communication
 - AC2.4 Describe ways of organising, structuring and presenting written information so it meets the needs of an audience
 - AC2.5 Describe ways of checking for the accuracy of written information
 - AC2.6 Explain the purpose of accurate use of grammar, punctuation and spelling
 - AC2.7 Explain what is meant by plain English, and why it is used
 - AC2.8 Explain the need to proofread and check written work
 - AC2.9 Explain how to identify work that is important and work that is urgent
 - AC2.10 Describe organisational procedures for saving and filing written communications
-

Learning outcome

The learner will:

- LO3 Understand how to communicate verbally

Assessment criteria

The learner can:

- AC3.1 Describe ways of verbally presenting information and ideas clearly
 - AC3.2 Explain ways of making contributions to discussions that help to move them forward
 - AC3.3 Describe methods of active listening
 - AC3.4 Explain the purpose of summarising verbal communications
-

Learning outcome

The learner will:

- LO4 Understand the purpose of feedback in developing communication skills

Assessment criteria

The learner can:

- AC4.1 Describe ways of getting feedback on communications
 - AC4.2 Explain the purpose of using feedback to develop communication skills
-

Learning outcome

The learner will:

LO5 Be able to plan communication

Assessment criteria

The learner can:

- AC5.1 Identify the purpose of communications and the audience(s)
- AC5.2 Select methods of communication to be used
- AC5.3 Confirm methods of communication, as required

Learning outcome

The learner will:

LO6 Be able to communicate in writing

Assessment criteria

The learner can:

- AC6.1 Find and select information needed for written communications
- AC6.2 Organise, structure and present information so that it is clear, accurate and meets the needs of the audience
- AC6.3 Use language that suits the purpose of written communication and the audience
- AC6.4 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear
- AC6.5 Proofread and check written communications and make amendments, as required
- AC6.6 Confirm what is important and what is urgent
- AC6.7 Produce written communications to meet agreed deadlines
- AC6.8 Keep a file copy of written communications sent

Learning outcome

The learner will:

LO7 Be able to communicate verbally

Assessment criteria

The learner can:

- AC7.1 Verbally present information and ideas to others clearly and accurately
- AC7.2 Make contributions to discussion(s) that move the discussion forward
- AC7.3 Actively listen to information given by other people, and make relevant responses
- AC7.4 Ask relevant questions to clarify own understanding, as required
- AC7.5 Summarise verbal communication(s) and agree that the correct meaning has been understood

Learning outcome

The learner will:

LO8 Be able to identify and agree ways of developing communication skills

Assessment criteria

The learner can:

AC8.1 Get feedback to confirm whether the communication has achieved its purpose

AC8.2 Use feedback to identify and agree ways of improving own communication skills

Supporting information

Evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1.	1.1–1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1–2.10	
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"> information selected
	6.2–6.5 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"> letters emails memos information formatted
	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"> presentation
	7.2 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"> minutes of meetings

Learning outcomes	Assessment criteria	Assessment guidance
	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"> • feedback received
	8.2	Evidence may be supplied via candidate reports/reflective accounts

Unit 205

Solve business problems

UAN:	L/601/2472
Level:	2
GLH:	12
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAG126.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Know how to recognise business problems and their causes

Assessment criteria

The learner can:

AC1.1 Outline ways of recognising when a business problem exists

AC1.2 Describe how to identify possible causes of business problems

Learning outcome

The learner will:

LO2 Understand techniques for solving business problems

Assessment criteria

The learner can:

AC2.1 Describe different ways of solving a business problem

- AC2.2 Outline different ways of planning to solve a business problem
 - AC2.3 Give reasons for having support and feedback from others when solving the business problem
 - AC2.4 Explain the purpose of checking progress and adjusting approaches to solving a business problem
 - AC2.5 Describe ways of recognising when a business problem has been solved
-

Learning outcome

The learner will:

- LO3 Know how to review approaches and solutions to business problems

Assessment criteria

The learner can:

- AC3.1 Outline ways of reviewing approaches to solving business problems
 - AC3.2 Outline ways of reviewing the effectiveness of solutions to business problems
-

Learning outcome

The learner will:

- LO4 Be able to recognise business problems

Assessment criteria

The learner can:

- AC4.1 Identify a business problem
 - AC4.2 Confirm own understanding of a business problem
 - AC4.3 Work with others to agree what the business problem is
-

Learning outcome

The learner will:

- LO5 Be able to plan and carry out a solution to a business problem

Assessment criteria

The learner can:

- AC5.1 Agree an approach for how to solve the business problem
 - AC5.2 Develop a plan to solve the business problem
 - AC5.3 Identify ways of deciding that the business problem has been solved
 - AC5.4 Agree approaches to solving the business problem, with others as required
 - AC5.5 Carry out a plan to solve the business problem, involving others as required
 - AC5.6 Use support and feedback from others to reach a solution
-

- AC5.7 Check progress towards solving the business problem
 - AC5.8 Use feedback and progress reports to adjust the plan, as required
 - AC5.9 Confirm that the business problem has been solved, with others as required
-

Learning outcome

The learner will:

- LO6 Be able to review a solution to the business problem

Assessment criteria

The learner can:

- AC6.1 Review an approach to solving a business problem for its effectiveness
- AC6.2 Review a solution to the business problem for its effectiveness
- AC6.3 Identify alternative approaches and solutions for possible effectiveness

Supporting information

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"> • minutes of meetings • memos • emails
5.	5.1–5.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts
	5.4–5.9	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"> • minutes of meetings • memos • emails
6.	6.1–6.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts

Unit 206

Work with other people in a business environment

UAN:	Y/601/2474
Level:	2
GLH:	10
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAG1210.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how your role fits with organisational values and practices

Assessment criteria

The learner can:

- AC1.1 Describe the sector in which your organisation operates
- AC1.2 Describe your organisation's missions and purpose
- AC1.3 Compare your organisation to other types of organisation in your sector
- AC1.4 Outline your responsibilities
- AC1.5 Describe how your role fits into your organisation's structure
- AC1.6 Describe how your role contributes to the organisation's operations
- AC1.7 Outline the policies, procedures, systems and values of your organisation that are relevant to your role
- AC1.8 Outline who you would consult if unsure about organisational policies, procedures, systems and values

Learning outcome

The learner will:

LO2 Understand how to work as part of a team to achieve goals and objectives

Assessment criteria

The learner can:

- AC2.1 Explain the purpose of working with other people to achieve goals and objectives
- AC2.2 Identify situations in which working with others can achieve positive results
- AC2.3 Explain the purpose and benefits of agreeing work goals and plans when working with others
- AC2.4 Describe situations in which team members might support each other
- AC2.5 Describe ways of providing support to other people in a team
- AC2.6 Explain the purpose of agreeing quality measures with a team

Learning outcome

The learner will:

LO3 Understand how to communicate as part of a team

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of communicating with other people in a team
- AC3.2 Identify different methods of communication and when to use them

Learning outcome

The learner will:

LO4 Understand the contribution of individuals within a team

Assessment criteria

The learner can:

- AC4.1 Explain the purpose of recognising the strengths of others
- AC4.2 Explain the value of diversity within teams
- AC4.3 Explain the purpose of respecting individuals working within a team

Learning outcome

The learner will:

LO5 Understand how to deal with problems and disagreements

Assessment criteria

The learner can:

- AC5.1 Describe the types of problems and disagreements that may occur when working with other people in a team
 - AC5.2 Describe ways of dealing with problems and disagreements when working with other people in a team
-

Learning outcome

The learner will:

- LO6 Understand the purpose of feedback when working as a team

Assessment criteria

The learner can:

- AC6.1 Explain the purpose of giving and receiving constructive feedback
 - AC6.2 Describe ways of using feedback to improve own work, and a team as a whole
-

Learning outcome

The learner will:

- LO7 Be able to work in a way that fits with organisational values and practices

Assessment criteria

The learner can:

- AC7.1 Follow organisational policies, systems and procedures relevant to your role
 - AC7.2 Apply relevant organisational values across all aspects of your work
 - AC7.3 Work with outside organisations and individuals in a way that protects the image of your organisation, when relevant
 - AC7.4 Seek guidance when unsure about organisational policies, systems, procedures and values
-

Learning outcome

The learner will:

- LO8 Be able to work in a team to achieve goals and objectives

Assessment criteria

The learner can:

- AC8.1 Communicate effectively with other people in a team
-

- AC8.2 Contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome
 - AC8.3 Make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team
 - AC8.4 Provide support to members of a team, if required
 - AC8.5 Show respect for individuals in a team
 - AC8.6 Make sure own work meets agreed quality standards and is on time
-

Learning outcome

The learner will:

- LO9 Be able to deal with or refer problems in a team

Assessment criteria

The learner can:

- AC9.1 Identify problem(s) or disagreement(s) in a team
 - AC9.2 Resolve problem(s) or disagreement(s) within limits of own authority and experience
 - AC9.3 Refer problems, as required
-

Learning outcome

The learner will:

- LO10 Be able to use feedback on objectives in a team

Assessment criteria

The learner can:

- AC10.1 Contribute to providing constructive feedback on the achievement of objectives to a team
- AC10.2 Receive constructive feedback on own work
- AC10.3 Use feedback on achievement of objectives to identify improvements in own work

Unit 206

Work with other people in a business environment

Supporting information

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.	2.1–2.6	
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">• minutes of meetings• memos• letters• emails
	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

Learning outcomes	Assessment criteria	Assessment guidance
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	<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"> • minutes of meetings • memos • emails
	10.2–10.3	<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"> • minutes of meetings • memos • emails • appraisals • performance reviews

Unit 207

Use electronic message systems

UAN:	H/601/2476
Level:	2
GLH:	6
Credit value	1
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA622.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about organising and updating messages using an electronic message system.

Learning outcome

The learner will:

LO1 Understand the use of electronic message systems

Assessment criteria

The learner can:

- AC1.1 Describe the main types of electronic message systems
- AC1.2 Describe the different features of electronic message systems
- AC1.3 Explain the purpose of keeping an electronic message system up to date
- AC1.4 Describe how to use an electronic message system to check and delete or discard messages
- AC1.5 Explain the purpose of leaving clear messages for others

Learning outcome

The learner will:

LO2 Be able to use electronic message systems

Assessment criteria

The learner can:

- AC2.1 Keep a message system up to date
- AC2.2 Check system for messages
- AC2.3 Respond to messages within agreed timescales
- AC2.4 Delete messages when dealt with
- AC2.5 Select the information to be given when taking or leaving messages
- AC2.6 Leave messages on other people's systems, if required

Unit 207

Use electronic message systems

Supporting information

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">• messages

Unit 208

Use a diary system

UAN:	K/601/2477
Level:	2
GLH:	9
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA431.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about using a diary system to organise and record work activities so that planned work can take place.

Learning outcome

The learner will:

LO1 Understand a diary system

Assessment criteria

The learner can:

AC1.1 Explain the purpose of using a diary system

AC1.2 Describe different types of diary systems

AC1.3 Describe the purpose of obtaining relevant information about requested diary entries and changes

Learning outcome

The learner will:

LO2 Understand how to use a diary system

Assessment criteria

The learner can:

- AC2.1 Describe the types of information needed for diary entries
 - AC2.2 Explain how to prioritise requests
 - AC2.3 Explain the purpose of prioritising requests
 - AC2.4 Explain the purpose of trying to balance the needs of all those involved
 - AC2.5 Explain the purpose of communicating changes to those affected
 - AC2.6 Explain the purpose of keeping a diary system up to date
 - AC2.7 Describe the different types of problems that may occur when new requests are made and solutions to these problems
 - AC2.8 Explain the purpose of following security and confidentiality procedures when using a diary system
-

Learning outcome

The learner will:

- LO3 Be able to use a diary system

Assessment criteria

The learner can:

- AC3.1 Obtain information needed to make diary entries
- AC3.2 Make diary entries accurately and clearly
- AC3.3 Prioritise changes to entries, as required
- AC3.4 Record agreed changes in the diary
- AC3.5 Identify and report the effects of any changes for existing entries
- AC3.6 Solve problems by negotiating alternative arrangements, when necessary
- AC3.7 Keep a diary up to date and store it securely

Unit 208

Use a diary system

Supporting information

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">• letters• emails• memos
	3.2 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">• diary• letters• emails• memos
	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">• diary

Unit 209

Take minutes

UAN:	M/601/2478
Level:	2
GLH:	15
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA441.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand the task of taking minutes at meetings

Assessment criteria

The learner can:

AC1.1 Describe the purpose of meetings

AC1.2 Describe legal and organisational requirements that may apply to minute taking

AC1.3 Explain the purpose of minutes as an accurate record of discussions and decisions

AC1.4 Describe the purpose of documents and terms that are commonly used in meetings

Learning outcome

The learner will:

LO2 Understand the role of the chair and other formal responsibilities in meetings

Assessment criteria

The learner can:

- AC2.1 Explain the role of the chair and other formal responsibilities within meetings
 - AC2.2 Describe how to work in partnership with the chair when taking minutes
-

Learning outcome

The learner will:

- LO3 Know how to take minutes at meetings

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of listening actively when taking minutes
 - AC3.2 Explain how to listen actively when minute taking
 - AC3.3 Describe how to take notes during discussions held at meetings
 - AC3.4 Explain the purpose of getting clarification
 - AC3.5 Describe how to get clarification
 - AC3.6 Describe different types of minutes and their purpose
 - AC3.7 Describe the different styles of writing that may be used in minute taking
 - AC3.8 Explain how to sort, select and structure information to produce minutes
 - AC3.9 Explain what is meant by using the correct tone and professional language in minutes
-

Learning outcome

The learner will:

- LO4 Be able to prepare for taking minutes

Assessment criteria

The learner can:

- AC4.1 Prepare for taking minutes, as required
 - AC4.2 Communicate with the meeting chair, as required
 - AC4.3 Note any changes to the agenda, matters arising and action points from last meeting
-

Learning outcome

The learner will:

- LO5 Be able to minute meetings

Assessment criteria

The learner can:

- AC5.1 Take notes at a meeting of all items required
 - AC5.2 Produce accurate minutes that record the meaning of discussions and decisions taken
-

- AC5.3 Make sure minutes are in the agreed style
- AC5.4 Make sure the process for signing off minutes and / or action points has been agreed
- AC5.5 Check minutes and make necessary amendments
- AC5.6 Agree minutes with the relevant people and circulate them within the agreed timescales
- AC5.7 Follow organisational requirements for confidentiality and security of information, as required
- AC5.8 Make sure follow-up actions, and who is responsible for taking the actions, have been clearly identified
- AC5.9 Store notes and minutes following organisational procedures
- AC5.10 Follow legal and organisational requirements for minute taking, as necessary

Unit 209

Take minutes

Supporting information

Evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1.	1.1–1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1–2.2	
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">• letters• emails• memos
	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">• agenda
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">• notes of meeting• minutes of meeting
	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">• minutes of meetings

Learning outcomes	Assessment criteria	Assessment guidance
	5.8 5.10	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes
	5.9	<p>Evidence may be supplied via witness testimony and candidate reports/reflective accounts</p>

Unit 210

Handle mail

UAN:	T/601/2479
Level:	2
GLH:	17
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA612.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about handling internal and external mail and packages within the service requirements of an organisation.

Learning outcome

The learner will:

LO1 Understand security procedures when handling mail or packages

Assessment criteria

The learner can:

AC1.1 Explain the purpose of security procedures for handling mail or packages

AC1.2 Give examples of security procedures for handling mail in organisation(s)

Learning outcome

The learner will:

LO2 Understand the range of available internal and external mail service

Assessment criteria

The learner can:

- AC2.1 Explain the purpose of distributing and dispatching mail to the correct recipient within agreed timescales
 - AC2.2 State the organisational structure and names, roles and locations of individuals and teams
 - AC2.3 Give examples of internal and external mail services available to organisations
 - AC2.4 Give reasons for selecting internal and external mail services
 - AC2.5 Describe the methods of calculating postage charges for mail or packages
 - AC2.6 Describe the types of problems that may occur with incoming and outgoing mail and how to deal with these
-

Learning outcome

The learner will:

- LO3 Be able to receive, distribute and collect internal mail or packages

Assessment criteria

The learner can:

- AC3.1 Receive, check and sort incoming mail or packages
 - AC3.2 Identify and deal with unwanted junk mail or damaged items
 - AC3.3 Identify and deal with suspicious items
 - AC3.4 Distribute incoming mail or packages
 - AC3.5 Collect, sort and prioritise outgoing mail or packages
-

Learning outcome

The learner will:

- LO4 Be able to follow procedures for despatching mail or packages

Assessment criteria

The learner can:

- AC4.1 Identify best options for despatching mail
 - AC4.2 Agree a cost for despatching mail or packages
 - AC4.3 Arrange services to collect outgoing mail or packages, if required
 - AC4.4 Identify and prepare items for urgent or special delivery, where necessary
 - AC4.5 Calculate correct postage charges for outgoing mail or packages
 - AC4.6 Record postage costs
 - AC4.7 Despatch outgoing mail or packages to agreed timescale
-

Learning outcome

The learner will:

LO5 Be able to resolve, report or refer problems that may occur in handling mail or packages

Assessment criteria

The learner can:

AC5.1 Identify where a problem may exist with incoming and outgoing mail or packages

AC5.2 Resolve, report or refer problems with incoming and outgoing mail or packages

Unit 210

Handle mail

Supporting information

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 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">• mail records• log book – special deliveries
	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">• mail records• log book – special deliveries
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
	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: <ul style="list-style-type: none">• mail records• log book – special deliveries

Unit 211

Provide reception services

UAN:	K/601/2480
Level:	2
GLH:	15
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAC312.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand the purpose of reception services in a business environment

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of the receptionist role as the first point of contact between the public / client and an organisation
- AC1.2 Explain the purpose of presenting a positive image of self and the organisation
- AC1.3 Explain how to present a positive image of self and the organisation

Learning outcome

The learner will:

LO2 Understand the procedures to be followed when providing reception services

Assessment criteria

The learner can:

- AC2.1 Describe the structure and lines of communication in an organisation
 - AC2.2 Explain how the structure in an organisation affects lines of communication
 - AC2.3 Explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities
 - AC2.4 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area
 - AC2.5 Explain the purpose of health and safety procedures when providing a reception service, including own responsibilities
 - AC2.6 Explain how to carry out health and safety procedures in a reception area
 - AC2.7 Describe the emergency procedures and your role within them
 - AC2.8 Describe the types of problems that may occur with visitors including, conflict and aggression
 - AC2.9 Explain ways of dealing with problems and when to refer them to an appropriate colleague
-

Learning outcome

The learner will:

- LO3 Understand ways of improving reception services and developing own role

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of suggesting ideas for improving a reception area
 - AC3.2 Explain the purpose of carrying out additional duties, if applicable, and give examples
-

Learning outcome

The learner will:

- LO4 Provide a reception service

Assessment criteria

The learner can:

- AC4.1 Present a positive image of self and the organisation
 - AC4.2 Provide individuals with requested information and other useful information, within guidelines on confidentiality
 - AC4.3 Follow entry and exit security procedures, if required
 - AC4.4 Follow relevant health and safety procedures
 - AC4.5 Deal with problems that may occur, if necessary
 - AC4.6 Refer problems, as required
 - AC4.7 Make sure a reception area gives a positive image of the organisation
 - AC4.8 Make suggestions for improving a reception area, as required
 - AC4.9 Follow organisational procedures in the event of an accident or emergency, as required
 - AC4.10 Look for and complete additional task(s) during quiet periods, as required
-

Unit 211

Provide reception services

Supporting information

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 4.7 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 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">• letters• emails• memos

Unit 212

Produce documents in a business environment

UAN:	T/601/2482
Level:	2
GLH:	15
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA211.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing high quality and attractive documents to agreed layouts, formats, styles to meet agreed deadlines.

Learning outcome

The learner will:

- LO1 Understand the purpose of producing high quality and attractive documents in a business environment

Assessment criteria

The learner can:

- AC1.1 Outline different types of documents that may be produced and the different styles that could be used
- AC1.2 Describe different formats in which text may be presented
- AC1.3 Explain the purpose and benefits of producing high-quality and attractive documents

Learning outcome

The learner will:

- LO2 Know the resources and technology available and how to use them when producing documents in a business environment

Assessment criteria

The learner can:

- AC2.1 Describe the types of resources available for producing high quality and attractive documents
 - AC2.2 Outline ways of using different resources to produce documents
 - AC2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features
-

Learning outcome

The learner will:

- LO3 Understand the purpose of following procedures when producing documents in a business environment

Assessment criteria

The learner can:

- AC3.1 Explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents
 - AC3.2 Outline different ways of organising content needed for documents
 - AC3.3 Outline ways of integrating and laying out text and non-text
 - AC3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
 - AC3.5 Explain the purpose of storing documents safely and securely, and ways of doing so
 - AC3.6 Explain the purpose of confidentiality and data protection when preparing documents
 - AC3.7 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO4 Be able to prepare for tasks

Assessment criteria

The learner can:

- AC4.1 Confirm the purpose, content, style and deadlines for documents
-

Learning outcome

The learner will:

- LO5 Be able to prepare for tasks

Assessment criteria

The learner can:

- AC5.1 Prepare resources needed to produce documents
- AC5.2 Organise the content required to produce documents
- AC5.3 Make use of technology, as required
- AC5.4 Format and produce documents to an agreed style
- AC5.5 Integrate non-text objects into an agreed layout, if required
- AC5.6 Check texts for accuracy
- AC5.7 Edit and correct texts, as required
- AC5.8 Clarify document requirements, when necessary
- AC5.9 Store documents safely and securely following organisational procedures
- AC5.10 Present documents to the required format and within the agreed deadlines

Unit 212

Produce documents in a business environment

Supporting information

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">• letters• emails• memos
5.	5.1–5.3 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 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">• documents produced

Unit 213

Prepare text from notes

UAN:	A/601/2483
Level:	2
GLH:	15
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA213.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing different types of text from own notes and notes written by other people to meet agreed timescales.

Learning outcome

The learner will:

LO1 Understand preparing text from notes

Assessment criteria

The learner can:

AC1.1 Describe different types of documents that may be produced from notes and the formats to be followed

AC1.2 Explain the difference between producing text from own notes and producing text from others' notes

Learning outcome

The learner will:

LO2 Understand the purpose and benefits of following procedures when preparing text from notes

Assessment criteria

The learner can:

- AC2.1 Explain the benefits of agreeing the purpose, format and deadline for preparing text from notes
 - AC2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text from notes
 - AC2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
 - AC2.4 Explain the purpose of storing text and notes safely and securely, and ways of doing so
 - AC2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
 - AC2.6 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to prepare for text from notes

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format and deadlines for texts
-

Learning outcome

The learner will:

- LO4 Be able to prepare text from notes

Assessment criteria

The learner can:

- AC4.1 Input text using keyboard skills
- AC4.2 Format text to agreed style and layout, making efficient use of available technology
- AC4.3 Clarify text requirements when necessary
- AC4.4 Read and check texts for accuracy
- AC4.5 Edit and correct texts, as required
- AC4.6 Store texts and original notes safely and securely following organisational procedures
- AC4.7 Produce texts to the required format and within agreed deadlines

Unit 213

Prepare text from notes

Supporting information

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

Unit 214

Prepare text from notes using touch typing (40 wpm)

UAN:	F/601/2484
Level:	2
GLH:	15
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA215.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing different types of text using touch typing at a minimum speed of 40 words per minute.

Learning outcome

The learner will:

LO1 Understand the task of preparing text from notes using touch typing

Assessment criteria

The learner can:

AC1.1 Describe different types of documents that may be produced from notes and the formats to be followed

AC1.2 Describe different forms in which texts may be presented

AC1.3 Explain the difference between producing text from own notes and producing text from others' notes

Learning outcome

The learner will:

LO2 Understand the purpose and benefits of following procedures when preparing text using touch typing

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for delivering text
 - AC2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text typed from notes
 - AC2.3 Describe ways of checking finished documents for accuracy and correctness
 - AC2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so
 - AC2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
 - AC2.6 Explain the purpose of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to prepare for tasks

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format and deadlines for texts
-

Learning outcome

The learner will:

- LO4 Be able to produce texts using touch typing

Assessment criteria

The learner can:

- AC4.1 Input texts using touch typing to a minimum speed of 40 words per minute
- AC4.2 Format texts to agreed style and layout making efficient use of available technology
- AC4.3 Clarify text requirements when necessary
- AC4.4 Read and check texts for accuracy
- AC4.5 Edit and correct texts, as required
- AC4.6 Store texts and original notes safely and securely following organisational procedures
- AC4.7 Present texts to the required format, within the agreed deadlines

Unit 214

Prepare text from notes using touch typing (40 wpm)

Supporting information

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.	2.1–2.6	
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">• letters• emails• memos
4.	4.1–4.2 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">• documents produced
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Unit 215

Prepare text from shorthand (60 wpm)

UAN:	J/601/2485
Level:	2
GLH:	55
Credit value	8
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD311.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand the task of preparing text from shorthand

Assessment criteria

The learner can:

AC1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed

AC1.2 Describe different forms in which texts may be presented

Learning outcome

The learner will:

LO2 Understand the purpose and value of following procedures when preparing text from shorthand

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand
 - AC2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
 - AC2.3 Explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so
 - AC2.4 Explain the purpose of confidentiality and data protection when preparing texts from shorthand notes
 - AC2.5 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to prepare for tasks, and use shorthand to take dictation

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format, and deadlines for preparing texts from shorthand
 - AC3.2 Take dictation using shorthand at a minimum speed of 60 words per minute
-

Learning outcome

The learner will:

- LO4 Be able to produce texts from shorthand

Assessment criteria

The learner can:

- AC4.1 Clarify text requirements, when necessary
 - AC4.2 Input and format texts to an agreed format from shorthand notes
 - AC4.3 Make efficient use of technology, as required
 - AC4.4 Read and check texts for accuracy
 - AC4.5 Edit and correct texts, as required
 - AC4.6 Store texts and original shorthand notes safely and securely following organisational procedures
 - AC4.7 Present texts to the required format and within the agreed deadlines
-

Unit 215

Prepare text from shorthand (60 wpm)

Supporting information

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">• letters• emails• memos
	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">• shorthand notes
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">• documents produced

Unit 216

Prepare text from recorded audio instruction (40 wpm)

UAN:	L/601/2486
Level:	2
GLH:	35
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD313.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand the task of preparing text from recorded audio instruction

Assessment criteria

The learner can:

- AC1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed
- AC1.2 Describe different forms in which texts may be presented
- AC1.3 Describe the different types of technology that are available for playing back recordings and their main features

Learning outcome

The learner will:

LO2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
- AC2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- AC2.3 Explain the purpose of storing texts and original recordings safely and securely, and ways of doing so
- AC2.4 Explain the purpose of confidentiality and data protection when preparing texts from recorded audio
- AC2.5 Explain the purpose and benefits of meeting deadlines

Learning outcome

The learner will:

- LO3 Be able to produce texts from audio recordings

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format, and deadlines for texts
- AC3.2 Input text from audio recordings at a minimum speed of 40 words per minute
- AC3.3 Format texts to agreed format making efficient use of available technology
- AC3.4 Clarify text requirements when necessary
- AC3.5 Read and check texts for accuracy
- AC3.6 Edit and correct texts, as required
- AC3.7 Store texts and original recordings safely and securely following organisational procedures
- AC3.8 Present texts to the required format and within the agreed deadlines

Unit 216

Prepare text from recorded audio instruction (40 wpm)

Supporting information

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 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	3.2–3.3 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">• documents produced

Unit 217

Organise and report data

UAN:	R/601/2487
Level:	2
GLH:	12
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD321.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about organising and reporting data to the agreed format and timescales.

Learning outcome

The learner will:

LO1 Understand how to organise and report data that has been researched

Assessment criteria

The learner can:

AC1.1 Describe different ways of organising data that has been researched

AC1.2 Describe different ways of reporting data

AC1.3 Describe the purpose of presenting data to the agreed format and within the agreed timescale

Learning outcome

The learner will:

LO2 Be able to organise data

Assessment criteria

The learner can:

AC2.1 Organise data so that it can be reported

AC2.2 Check the accuracy of the data, and make adjustments, if required

AC2.3 Obtain feedback on data collected, if required

Learning outcome

The learner will:

LO3 Be able to report data

Assessment criteria

The learner can:

AC3.1 Present data in agreed format

AC3.2 Present data to agreed timescale

Unit 217

Organise and report data

Supporting information

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
	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">• feedback obtained
3.	3.1–3.2	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">• letters• emails• memos• examples of data

Unit 218

Research information

UAN:	Y/601/2488
Level:	2
GLH:	17
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD323.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about organising suitable data that has been researched using different sources of information.

Learning outcome

The learner will:

LO1 Understand procedures for researching information

Assessment criteria

The learner can:

AC1.1 Give reasons for agreeing objectives and deadlines for researching information

AC1.2 Give reasons for identifying and agreeing sources of information

AC1.3 Explain the purpose of recording and storing information researched

Learning outcome

The learner will:

LO2 Be able to research information for others

Assessment criteria

The learner can:

AC2.1 Agree aims, objectives and deadlines for the information search

AC2.2 Identify sources of information

- AC2.3 Search for and obtain data
- AC2.4 Check that data is suitable for the purpose of the research
- AC2.5 Record the data and store it securely
- AC2.6 Make a record of information sources used
- AC2.7 Meet deadlines for completing research

Unit 218

Research information

Supporting information

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	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• notes of informal meetings
	2.4	
	2.2–2.3 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
	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">• records

Unit 219

Store and retrieve information

UAN:	R/601/2490
Level:	2
GLH:	17
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD332.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation.

Learning outcome

The learner will:

LO1 Understand processes and procedures for storing and retrieving information

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of storing and retrieving required information
- AC1.2 Describe different information systems and their main features
- AC1.3 Explain the purpose of legal and organisational requirements for the security and confidentiality of information
- AC1.4 Explain the purpose of confirming information to be stored and retrieved
- AC1.5 Describe ways of checking information for accuracy
- AC1.6 Explain the purpose of checking information for accuracy
- AC1.7 Explain the purpose of providing information to agreed format and timescales
- AC1.8 Describe the types of information that may be deleted
- AC1.9 Describe problems that may occur with information systems and how to deal with them, when necessary

Learning outcome

The learner will:

LO2 Be able to store information

Assessment criteria

The learner can:

- AC2.1 Identify, confirm and collect information to be stored
- AC2.2 Follow legal and organisational procedures for security and confidentiality of information to be stored
- AC2.3 Store information in approved locations
- AC2.4 Check and update stored information, if required
- AC2.5 Delete stored information, if required
- AC2.6 Deal with, or refer problems, if required

Learning outcome

The learner will:

LO3 Be able to retrieve information

Assessment criteria

The learner can:

- AC3.1 Confirm and identify information to be retrieved
- AC3.2 Follow legal and organisational procedures for security and confidentiality of information
- AC3.3 Locate and retrieve the required information
- AC3.4 Check and update information, if required
- AC3.5 Provide information in the agreed format and timescale
- AC3.6 Deal with, or refer problems if required

Unit 219

Store and retrieve information

Supporting information

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

Unit 220

Archive information

UAN:	Y/601/2491
Level:	2
GLH:	13
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD334.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand procedures for archiving information

Assessment criteria

The learner can:

- AC1.1 Explain why and when required information should be archived
- AC1.2 Explain the purpose of agreeing retention periods for archiving information
- AC1.3 Describe procedures to be followed for archiving information, including legal requirements, if required
- AC1.4 Explain the purpose of organisational and legal requirements for the security and confidentiality of archived information
- AC1.5 Explain the purpose of deciding and agreeing information to be archived
- AC1.6 Describe procedures for recording and keeping archived information
- AC1.7 Explain how to retrieve archived information
- AC1.8 Describe how to delete information from an archive system
- AC1.9 Describe problems that may occur with systems containing archived information and how to deal with them or refer them

AC1.10 Describe the purpose of conforming to requirements of an external archive system, if outsourced from the organisation

Learning outcome

The learner will:

LO2 Be able to archive information

Assessment criteria

The learner can:

- AC2.1 Decide and agree the information to be archived, retrieved and deleted
- AC2.2 Decide and agree on the retention period for information being archived
- AC2.3 Follow legal and organisational policies and procedures for security and confidentiality of information
- AC2.4 Archive information to the agreed brief and timescale
- AC2.5 Maintain and update a record of information archived
- AC2.6 Resolve or refer problems, if required
- AC2.7 Retrieve archived information on request
- AC2.8 Delete archived information, if required
- AC2.9 Conform to requirements of external archive systems, if outsourced from the organisation

Supporting information

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 2.4 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"> • letters • emails • memos • information
	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"> • records

Unit 221

Use office equipment

UAN:	H/601/2493
Level:	2
GLH:	18
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA231.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about using a variety of different office equipment following manufacturer's and organisational guidelines.

Learning outcome

The learner will:

LO1 Know about different types of office equipment and its uses

Assessment criteria

The learner can:

AC1.1 Identify different types of equipment and their uses

AC1.2 Describe the different features of different types of office equipment

AC1.3 Explain why different types of equipment are chosen for tasks

Learning outcome

The learner will:

LO2 Understand the purpose of following instructions and health and safety procedures

Assessment criteria

The learner can:

AC2.1 Explain the purpose of following manufacturer's instructions when using equipment

- AC2.2 Explain the purpose of following organisational instructions when using equipment
 - AC2.3 Identify health and safety procedures for using different types of equipment
 - AC2.4 Explain the purpose of following health and safety procedures when using equipment
 - AC2.5 Explain the purpose of keeping equipment clean and hygienic
-

Learning outcome

The learner will:

- LO3 Understand how to use equipment in a way that minimises waste

Assessment criteria

The learner can:

- AC3.1 Give examples of waste when using equipment
 - AC3.2 Give examples of ways to reduce waste
 - AC3.3 Explain the purpose of minimising waste
-

Learning outcome

The learner will:

- LO4 Know about the different types of problems that may occur when using equipment and how to deal with them

Assessment criteria

The learner can:

- AC4.1 Give examples of equipment problems
 - AC4.2 Explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems
 - AC4.3 Give examples of how to deal with problems
-

Learning outcome

The learner will:

- LO5 Understand the purpose of meeting work standards and deadlines

Assessment criteria

The learner can:

- AC5.1 Explain the purpose of meeting work standards and deadlines when using equipment
-

Learning outcome

The learner will:

LO6 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

Learning outcome

The learner will:

LO7 Be able to use office equipment

Assessment criteria

The learner can:

AC7.1 Locate and select equipment needed for a task

AC7.2 Use equipment following manufacturer's and organisational guidelines

AC7.3 Use equipment minimising waste

AC7.4 Keep equipment clean and hygienic

AC7.5 Deal with equipment problems following manufacturer's and organisational procedures

AC7.6 Refer problems, if required

AC7.7 Make sure final work product meets agreed requirements

AC7.8 Make sure that product is delivered to agreed timescale

AC7.9 Make sure equipment, resources and work area are ready for the next user

Unit 221

Use office equipment

Supporting information

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	
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: <ul style="list-style-type: none">• letters• emails• memos

Unit 222

Maintain and issue stationery stock items

UAN:	M/601/2495
Level:	2
GLH:	14
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAF141.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand procedures for maintaining and issuing stationery stock items

Assessment criteria

The learner can:

- AC1.1 Outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationery stock items
- AC1.2 Outline ways of keeping up-to-date, accurate and legible records of stationery stock items
- AC1.3 Explain the purpose of knowing the level of demand for stationery stock items and how this may affect requirements for ordering and stock held
- AC1.4 Outline other factors that may affect the future level of demand for stationery stock held
- AC1.5 Give examples of suppliers that may be used when ordering stationery stock items
- AC1.6 Outline differences between ordering stationery stock items from internal and external suppliers
- AC1.7 Outline organisational procedures for issuing stationery stock items
- AC1.8 Outline when it may be necessary to ask for receipts for stationery stock items issued

Learning outcome

The learner will:

LO2 Know how to handle, store and dispose of stationery stock items

Assessment criteria

The learner can:

AC2.1 Outline organisational procedures for handling and storing stationery stock items safely and securely

AC2.2 Outline organisational procedures for the correct and safe disposal of stationery stock items

Learning outcome

The learner will:

LO3 Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them

Assessment criteria

The learner can:

AC3.1 Describe types of problems that may occur with deliveries and stationery stock items

AC3.2 Describe organisational procedures for dealing with problems

Learning outcome

The learner will:

LO4 Understand how to make recommendations for improving stationery stock handling

Assessment criteria

The learner can:

AC4.1 Describe organisational procedures for recommending improvements for ordering, taking delivery, storing, stock-taking, issuing and disposing of unwanted or damaged stationery stock items

Learning outcome

The learner will:

LO5 Be able to maintain stationery stock levels

Assessment criteria

The learner can:

- AC5.1 Maintain stationery stock items to required levels
 - AC5.2 Handle and store stationery stock safely and securely, maintaining its condition and following organisational procedures
 - AC5.3 Carry out stock-takes as instructed and report problems
 - AC5.4 Order stationery stock from suppliers within limits of own authority
 - AC5.5 Chase up orders with suppliers
 - AC5.6 Check incoming deliveries against orders and report any problems
 - AC5.7 Keep up-to-date, accurate and legible records of stationery stock delivered and held
-

Learning outcome

The learner will:

- LO6 Be able to issue items from stationery stock

Assessment criteria

The learner can:

- AC6.1 Issue stationery stock items as requested, following organisational procedures
 - AC6.2 Keep up-to-date, accurate and legible records of stationery stock items issued
-

Learning outcome

The learner will:

- LO7 Be able to deal with unwanted or damaged items of stationery stock

Assessment criteria

The learner can:

- AC7.1 Dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements
-

Learning outcome

The learner will:

- LO8 Be able to make recommendations to improve stationery stock handling

Assessment criteria

The learner can:

- AC8.1 Identify and recommend ways in which systems for receiving, issuing and disposing of stationery stock could be improved, as required
-

Supporting information

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 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • stock records
	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"> • purchase orders
5.	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"> • letters • emails • memos

Learning outcomes	Assessment criteria	Assessment guidance
	5.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • delivery notes
6.	6.1–6.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • stock records • emails • memos
7.	7.1	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts</p>
8.	8.1	<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"> • emails • memos • appraisals

Unit 223

Support the organisation of an event

UAN:	L/601/2505
Level:	2
GLH:	15
Credit value	2
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA311.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about supporting the organisation of an event.

Learning outcome

The learner will:

LO1 Understand the role and purpose of providing support with the organisation of an event

Assessment criteria

The learner can:

- AC1.1 Describe the role and responsibilities required when supporting the organisation of an event
- AC1.2 Identify a range of support activities that may be required when supporting the organisation of an event
- AC1.3 Identify the purpose and value of giving assistance with organising an event
- AC1.4 Describe the different types of events and their main features
- AC1.5 Describe the types of risks associated with events and how to minimise these
- AC1.6 Outline the types of information that delegates will need
- AC1.7 Explain how to identify suitable venues for different types of events
- AC1.8 Describe the types of resources needed to prepare for different types of events
- AC1.9 Outline the different special requirements that delegates may have and how to meet these
- AC1.10 Describe the health, safety and security requirements that need to be considered when organising events

Learning outcome

The learner will:

LO2 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

Unit 223

Support the organisation of an event

Supporting information

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

Unit 224

Support the co-ordination of an event

UAN:	D/601/2508
Level:	2
GLH:	20
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA311.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about supporting the co-ordination and delivery of an event.

Learning outcome

The learner will:

LO1 Understand the role and purpose of supporting the coordination of an event

Assessment criteria

The learner can:

- AC1.1 Describe the range of support activities that may be required when supporting the co-ordination of an event
- AC1.2 Identify the responsibilities involved in supporting the co-ordination of an event
- AC1.3 Describe the types of problems that may occur during events and how to deal with these
- AC1.4 Describe the points to observe when clearing and vacating an event
- AC1.5 Describe the types of follow-up activities that may be required to carry out the co-ordination of an event

Learning outcome

The learner will:

LO2 Be able to support the co-ordination of an event

Assessment criteria

The learner can:

AC2.1 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

Unit 224

Support the co-ordination of an event

Supporting information

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 observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• evaluation reports

Unit 225

Support the organisation of business travel or accommodation

UAN:	Y/601/2510
Level:	2
GLH:	18
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA321.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about supporting the delivery of business travel or accommodation arrangements following instruction from the organiser or traveller(s).

Learning outcome

The learner will:

- LO1 Understand the purpose of confirming a brief and budget for business travel or accommodation

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of obtaining and confirming instructions for arranging business travel or accommodation
- AC1.2 Explain the purpose and benefits of confirming the requirements of a brief and budget for business travel or accommodation arrangements
- AC1.3 Explain the purpose of following the requirements of a brief and budget for business travel or accommodation arrangements
- AC1.4 Describe how to support the organisation of business travel or accommodation to meet expectations
- AC1.5 Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow
- AC1.6 Describe how to obtain best value for money when making business travel or accommodation arrangements

- AC1.7 Describe how to keep records of business travel or accommodation arrangements
 - AC1.8 Outline the documents and information to provide to the person who is travelling and how to obtain these
 - AC1.9 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
-

Learning outcome

The learner will:

- LO2 Know the sources of information and facilities available to make business travel or accommodation arrangements

Assessment criteria

The learner can:

- AC2.1 Describe sources of information, and the facilities available, for making business travel or accommodation arrangements
-

Learning outcome

The learner will:

- LO3 Be able to support the organisation with business travel or accommodation arrangements

Assessment criteria

The learner can:

- AC3.1 Confirm the brief and budget for business travel or accommodation arrangements
 - AC3.2 Check a draft itinerary and schedule with organiser or traveller(s)
 - AC3.3 Identify suitable business travel or accommodation options
 - AC3.4 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
 - AC3.5 Obtain confirmations, and collate documents for business travel or accommodation arrangements
 - AC3.6 Maintain records of business travel or accommodation arranged
 - AC3.7 Provide the organiser or traveller(s) with an itinerary and required documents in good time
 - AC3.8 Confirm with the organiser or traveller(s) that itinerary and documents meet requirements
 - AC3.9 Resolve or refer problems to the appropriate person
-

Unit 225

Support the organisation of business travel or accommodation

Supporting information

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">• letters• emails• memos• briefs• budgets
	3.2–3.5 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">• letters• emails• memos
	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">• records

Unit 226

Support the organisation of meetings

UAN:	T/601/2515
Level:	2
GLH:	18
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA411.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about supporting the planning and organisation of meetings.

Learning outcome

The learner will:

- LO1 Understand the arrangements to be made to support the planning and organising of meetings

Assessment criteria

The learner can:

- AC1.1 Describe the role and responsibilities for supporting the organiser of the meeting
- AC1.2 Describe different types of meetings and their main features
- AC1.3 Describe how to help plan meetings to meet agreed aims and objectives
- AC1.4 Describe the types of resources that may be needed for different types of meetings
- AC1.5 Describe health, safety and security arrangements to follow when organising meetings
- AC1.6 Explain the purpose of following the agreed brief, plan and the resources required, for arranging a meeting
- AC1.7 Identify the sources and types of information and services needed to arrange a meeting
- AC1.8 Describe how to help the meeting organiser during the meeting
- AC1.9 Describe the organisational procedures for clearing and vacating a meeting room

Learning outcome

The learner will:

LO2 Be able to prepare for a meeting

Assessment criteria

The learner can:

- AC2.1 Confirm the purpose and venue of a meeting
- AC2.2 Confirm a budget for a meeting, if required
- AC2.3 Organise and confirm venue, equipment and catering requirement, if required requirements
- AC2.4 Invite attendees and confirm attendance
- AC2.5 Collate and dispatch papers for a meeting within agreed timescales
- AC2.6 Make sure attendees' needs are met
- AC2.7 Make sure equipment and layout of the rooms meets the meeting brief
- AC2.8 Keep records of arrangements made and services used
- AC2.9 Attend to any requirements during the meeting as directed by the meeting organiser

Learning outcome

The learner will:

LO3 Be able to follow up a meeting

Assessment criteria

The learner can:

- AC3.1 Follow organisation procedures for clearing a meeting room
- AC3.2 Circulate a meeting record to agreed timescales
- AC3.3 Make sure arrangements for payments have been met, if required
- AC3.4 Contribute to the evaluation of arrangements made for meetings, as required

Unit 226

Support the organisation of meetings

Supporting information

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">• letters• emails• memos• event documentation	
	2.3–2.6		
	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">• letters• emails• memos• budgets
	2.7 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">• records	

Learning outcomes	Assessment criteria	Assessment guidance
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	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos

Unit 227

Respond to change in a business environment

UAN:	F/601/2517
Level:	2
GLH:	16
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA111.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about recognising the effects of changes in workplace activities and the people who carry them out.

Learning outcome

The learner will:

LO1 Understand the causes and effects of change in a business environment

Assessment criteria

The learner can:

AC1.1 Give examples of changes in working practices in a business environment, and explain why they are happening

AC1.2 Describe the possible effects of changes in working practices on people within a business environment

AC1.3 Explain how change can benefit an organisation, team and individual

Learning outcome

The learner will:

LO2 Understand own role in supporting change

Assessment criteria

The learner can:

- AC2.1 Describe ways in which individuals can support change in a business environment
 - AC2.2 Explain the purpose and benefits of contributing to planning for change
 - AC2.3 Explain how individuals can prepare for changes within a business environment and in ways of working
 - AC2.4 Describe the types of support that people need during change
 - AC2.5 Explain the benefits of good communication with others and accurate information during change
 - AC2.6 Describe how to identify the effects of changes on own work and reasons for doing so
 - AC2.7 Explain the purpose of reviewing the effects of changes on people, processes and outcomes
 - AC2.8 Describe ways of reviewing the effects of changes on people, processes and outcomes
-

Learning outcome

The learner will:

- LO3 Understand own role in responding to change

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of change as part of a process of continuous improvement
 - AC3.2 Explain the possible effects of changes on own values
 - AC3.3 Explain the benefits of responding positively to changes
-

Learning outcome

The learner will:

- LO4 Be able to respond to change

Assessment criteria

The learner can:

- AC4.1 Identify changes needed in own area of work
 - AC4.2 Make suggestions for change
 - AC4.3 Complete own work tasks using changed procedures or ways of working
 - AC4.4 Identify where training or other support is needed
 - AC4.5 Actively seek support, as required
 - AC4.6 Give support to other people during change, or seek support, as required
 - AC4.7 Ask questions to clarify issues
-

Learning outcome

The learner will:

LO5 Be able to support the evaluation of change

Assessment criteria

The learner can:

AC5.1 Give feedback on the effects of changes in own work

AC5.2 Make suggestions for further actions, as required

Unit 227

Respond to change in a business environment

Supporting information

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 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">• letters• emails• memos
	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">• Tasks completed
	4.5–4.7	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
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: <ul style="list-style-type: none">• feedback given by learner

**Learning
outcomes****Assessment
criteria****Assessment guidance**

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

UAN:	J/601/2518
Level:	2
GLH:	40
Credit value	7
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD121.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about supporting the management and evaluation of an information system to meet identified needs in a business environment.

Learning outcome

The learner will:

LO1 Understand how to contribute to the management of an information system

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of managing information to meet requirements
- AC1.2 Explain the purpose and value of supporting training for users and giving or requesting on-going support
- AC1.3 Explain the purpose of complying with legal and organisation requirements when using an information system
- AC1.4 Explain the purpose of contributing to the monitoring of an information system in use
- AC1.5 Explain the purpose of contributing to the maintenance and updating of an information system
- AC1.6 Describe ways of contributing to the maintenance and updating of an information system
- AC1.7 Describe the types of problems that may occur with an information system and how to deal with them

Learning outcome

The learner will:

- LO2 Understand how to contribute to the review and further development of an information system

Assessment criteria

The learner can:

- AC2.1 Explain the purpose and value of contributing to the continuous improvement of an information system
AC2.2 Explain how to identify problems in an information system and report them
AC2.3 Describe ways of contributing to the resolution of problems in an information system
-

Learning outcome

The learner will:

- LO3 Be able to contribute to the management of an information system

Assessment criteria

The learner can:

- AC3.1 Contribute to training on the use of an information system
AC3.2 Contribute to supporting users, if required
AC3.3 Monitor own use of an information system
AC3.4 Confirm legal and organisational requirements for handling information are followed
AC3.5 Make sure a system is maintained and updated, within limits of own authority
AC3.6 Identify and report problems when they occur
AC3.7 Resolve problems within limits of own authority
-

Learning outcome

The learner will:

- LO4 Be able to contribute to the evaluation of an information system

Assessment criteria

The learner can:

- AC4.1 Provide feedback on performance of an information system
AC4.2 Contribute to the evaluation of feedback and prioritising of development needs, if required
AC4.3 Contribute information to enable further system development
-

Unit 228

Support the management and development of an information system

Supporting information

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">• training records• diary
	3.2 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">• letters• emails• memos• diary
	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">• feedback• minutes of meetings

Unit 229

Meet and welcome visitors

UAN:	Y/601/2457
Level:	2
GLH:	23
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAC311.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit covers the procedures to follow and hospitality to offer when meeting and welcoming visitors to business premises.

Learning outcome

The learner will:

LO1 Understand procedures for meeting and welcoming visitors

Assessment criteria

The learner can:

- AC1.1 Describe different reasons for people visiting a business, their requirements and how their needs may be met
- AC1.2 Explain the purpose of dealing with visitors promptly and courteously
- AC1.3 Explain the purpose of presenting a positive image of self and the organisation
- AC1.4 Explain the purpose of following health, safety and security procedures when dealing with visitors, including own responsibilities
- AC1.5 Describe different types of problems that may occur with visitors including, conflict and aggression
- AC1.6 Describe ways of dealing with different problems and when to refer them to an appropriate colleague
- AC1.7 Explain the purpose of communicating with visitors
- AC1.8 Describe organisation structures and communication channels within the organisation

Learning outcome

The learner will:

LO2 Be able to meet and welcome visitors

Assessment criteria

The learner can:

- AC2.1 Greet visitor(s) and make them feel welcome
- AC2.2 Identify visitors and the reason for their visit
- AC2.3 Use the organisation's systems to receive and record visitors, as appropriate
- AC2.4 Make sure visitors' needs are met
- AC2.5 Present positive image of self and the organisation
- AC2.6 Follow health, safety and security procedures, as required
- AC2.7 Inform others of visitors' arrival, as required, in line with appropriate communication channels
- AC2.8 Deal with any problems that may occur, or refer problems to the appropriate person
- AC2.9 Follow procedures for departing visitors, as required

Unit 229

Meet and welcome visitors

Supporting information

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 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 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">visitors book

Unit 230

Administer human resource records

UAN:	T/601/2790
Level:	2
GLH:	20
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAB151.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how to create personnel files for new starters

Assessment criteria

The learner can:

AC1.1 Describe the systems, procedures and software used by the organisation for administering Human Resource records

AC1.2 Describe the information that should be entered in a new personnel file

Learning outcome

The learner will:

LO2 Understand how to maintain Human Resource information

Assessment criteria

The learner can:

- AC2.1 Explain how to enter and update Human Resource information in a personnel file
 - AC2.2 Describe the Human Resource information that should be held for members of staff
 - AC2.3 Explain the action that should be taken if Human Resource information is incomplete
-

Learning outcome

The learner will:

- LO3 Understand how to report Human Resource information

Assessment criteria

The learner can:

- AC3.1 Describe the types of Human Resource reports that may be requested
 - AC3.2 Explain how to produce reports from individual or multiple Human Resource files
-

Learning outcome

The learner will:

- LO4 Understand the organisational and legal requirements for administering Human Resource records

Assessment criteria

The learner can:

- AC4.1 Describe the current legislation that applies when dealing with Human Resource records
 - AC4.2 Clarify the limits and scope of responsibilities and authority in administering HR records
 - AC4.3 Describe the data protection principles that apply to HR records
 - AC4.4 Explain organisation procedures for confidentiality of HR records
 - AC4.5 Explain organisation procedures for security of HR records
 - AC4.6 Explain the purpose of confidentiality and security of HR information
 - AC4.7 Describe the potential consequences of a breach of confidentiality or security
 - AC4.8 Explain organisation policy and procedure for removal of out of date HR information
 - AC4.9 Explain organisation policy and procedure for archiving HR information
-

Learning outcome

The learner will:

- LO5 Be able to create personnel files for new starters

Assessment criteria

The learner can:

- AC5.1 Open a new personnel file
-

- AC5.2 Record required information about employee
 - AC5.3 File relevant employee documents
 - AC5.4 Process monitoring data, as appropriate
 - AC5.5 Check that information is complete, requesting missing information where necessary
-

Learning outcome

The learner will:

- LO6 Be able to maintain Human Resource information

Assessment criteria

The learner can:

- AC6.1 Keep required personnel information up to date
 - AC6.2 Maintain records of personnel information
 - AC6.3 Process and file relevant correspondence and documentation
-

Learning outcome

The learner will:

- LO7 Be able to report Human Resource information

Assessment criteria

The learner can:

- AC7.1 Provide information from individual personnel files as requested
 - AC7.2 Provide management information reports as requested
-

Learning outcome

The learner will:

- LO8 Be able to comply with organisational and legal requirements

Assessment criteria

The learner can:

- AC8.1 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information
 - AC8.2 Remove out of date information in line with organisational policy and procedures
 - AC8.3 Archive relevant information in line with current legislation and organisational policy and procedures
-

Unit 231

Administer the recruitment and selection process

UAN:	A/601/2791
Level:	2
GLH:	30
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAB152.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how to advertise job vacancies

Assessment criteria

The learner can:

- AC1.1 Explain organisational policies, procedures and constraints that affect the area of responsibility
- AC1.2 Explain the procedures to identify and process personnel requirements in the organisation
- AC1.3 Explain ways in which personnel requirements are expressed in job descriptions and persons specifications
- AC1.4 Explain how to interpret personnel requirements in job descriptions and persons specifications
- AC1.5 Describe the current legislation, that applies when dealing with recruitment and selection
- AC1.6 Clarify the limits and scope of their responsibilities and authority in administering the recruitment and selection process

- AC1.7 Describe the types of information to include in a job advertisement
 - AC1.8 Explain the legal/organisational requirements that affect the type of information in the job advertisement
 - AC1.9 Explain how to place advertisements in different locations
 - AC1.10 Explain how to liaise with recruitment agencies
-

Learning outcome

The learner will:

- LO2 Understand how to respond to potential applicants

Assessment criteria

The learner can:

- AC2.1 Describe the type of information that should be in an application pack
 - AC2.2 Describe the types of queries that applicants may have
 - AC2.3 Explain how to respond to the queries that applicants may have
 - AC2.4 Explain how to keep records of responses received
 - AC2.5 Clarify the purpose of keeping records of responses received
-

Learning outcome

The learner will:

- LO3 Understand how to administer the selection process

Assessment criteria

The learner can:

- AC3.1 Describe organisational procedures used to shortlist the applicants
 - AC3.2 Describe the procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process
 - AC3.3 Explain how to process feedback for unsuccessful applicants
 - AC3.4 Describe the different types of selection processes that may be used and how they work
 - AC3.5 Clarify the selection processes used in the organisation and their role in those
 - AC3.6 Explain the administrative support needed for different types of selection processes
 - AC3.7 Explain the procedures for obtaining the resources needed for the selection process
 - AC3.8 Describe the range of documentation that is used for selection by their organisation
 - AC3.9 Clarify the purpose of giving candidates a favourable impression of the organisation
 - AC3.10 Describe the range of records that must be kept following the selection process
 - AC3.11 Explain the purpose of following organisational procedures for keeping records following the selection process
-

Learning outcome

The learner will:

LO4 Understand how to administer the appointment process

Assessment criteria

The learner can:

- AC4.1 Describe the range of pre-employment checks
- AC4.2 Explain how to carry out pre-employment checks
- AC4.3 Explain how to format offer letters and employment contracts
- AC4.4 Explain the purpose of confidentiality and security of record keeping

Learning outcome

The learner will:

LO5 Be able to advertise job vacancies

Assessment criteria

The learner can:

- AC5.1 Confirm the personnel requirements with the responsible person
- AC5.2 Confirm the information that will appear in the job advertisement
- AC5.3 Confirm how the vacancy will be advertised
- AC5.4 Advertise the vacancy as agreed
- AC5.5 Liaise with relevant agencies to confirm details of job vacancies
- AC5.6 Liaise with the relevant agencies to make sure they understand the requirements of the organisation

Learning outcome

The learner will:

LO6 Be able to respond to potential applicants

Assessment criteria

The learner can:

- AC6.1 Send out application packs or other information to potential applicants
- AC6.2 Respond appropriately to queries from potential applicants
- AC6.3 Maintain records of responses received

Learning outcome

The learner will:

LO7 Be able to administer the selection process

Assessment criteria

The learner can:

- AC7.1 Collate applications and make available to those involved in the selection
 - AC7.2 Invite shortlisted candidates to take part in the selection process
 - AC7.3 Process feedback to unsuccessful applicants
 - AC7.4 Keep records of responses from shortlisted candidates
 - AC7.5 Provide appropriate support for the selection process
 - AC7.6 Help to make sure candidates have a positive impression of the organisation
 - AC7.7 Keep records of the outcomes of the selection process
-

Learning outcome

The learner will:

LO8 Be able to administer the appointment process

Assessment criteria

The learner can:

- AC8.1 Carry out appropriate pre-employment checks
- AC8.2 Format and send out offer letters and employment contracts
- AC8.3 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements

Unit 243

Administer parking dispensations

UAN:	J/601/2647
Level:	2
GLH:	14
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration BAB131.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about the skills, knowledge and understanding required to administer dispensations.

Learning outcome

The learner will:

- LO1 Understand the organisational and legal context for administering parking dispensations

Assessment criteria

The learner can:

- AC1.1 Describe the services that they are responsible for
- AC1.2 Clarify the limits and scope of their responsibilities and authority in providing services
- AC1.3 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility
- AC1.4 Explain how to apply the organisation's policies, procedures and constraints that affect services in their area of responsibility
- AC1.5 Describe the current legislation, Traffic Regulation Orders and other regulations that apply
- AC1.6 The requirements of the Data Protection Act and its implications for own role
- AC1.7 Describe the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges
- AC1.8 Explain how to use the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges

Learning outcome

The learner will:

LO2 Understand the processes involved in administering parking dispensations

Assessment criteria

The learner can:

- AC2.1 Explain the criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations / waivers and blue badges
- AC2.2 Clarify the range of checks that are relevant to applications
- AC2.3 Explain how and when to carry out the range of checks that are relevant to applications
- AC2.4 Clarify the organisation's anti-fraud policies and procedures
- AC2.5 Explain how to operate the organisation's anti-fraud policies and procedures
- AC2.6 Describe the evidence required to support an application for a permit, season tickets, suspension, dispensation / waiver or blue badge
- AC2.7 Explain the payment and refund processing within the organisation
- AC2.8 Explain how to communicate effectively with customers and other relevant departments
- AC2.9 Clarify the importance of the audit trail of controlled stationery
- AC2.10 Explain how to update and maintain records as necessary

Learning outcome

The learner will:

LO3 Be able to receive and process applications for parking dispensations

Assessment criteria

The learner can:

- AC3.1 Advise customers on criteria for eligibility
- AC3.2 Review applications and supporting evidence against published criteria
- AC3.3 Seek additional evidence from the customer if required
- AC3.4 Carry out relevant checks in accordance with organisational procedures
- AC3.5 Where necessary, seek opinions from appropriate medical professionals
- AC3.6 Handle supporting documentation securely and in line with current legislation or relevant terms and conditions
- AC3.7 Make a decision to approve or decline the application

Learning outcome

The learner will:

LO4 Be able to issue documentation for parking dispensations

Assessment criteria

The learner can:

- AC4.1 Communicate the decision to the customer, return documentation where necessary and issue appropriate paperwork
- AC4.2 Maintain appropriate records including renewals
- AC4.3 Process payments and handle refunds in line with organisational procedures
- AC4.4 Communicate the decision or information to other relevant departments

Unit 310

Develop a presentation

UAN:	M/601/2528
Level:	3
GLH:	15
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA617.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about developing a presentation.

Learning outcome

The learner will:

LO1 Understand the purpose of preparing for and evaluating a presentation

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of using different types of presentation and equipment to provide information
- AC1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies
- AC1.3 Explain the benefits of preparing for giving a presentation
- AC1.4 Explain and illustrate how presentations may be enhanced by materials and equipment
- AC1.5 Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation

Learning outcome

The learner will:

LO2 Be able to develop a presentation

Assessment criteria

The learner can:

- AC2.1 Agree and confirm audience, purpose, content, style and timing of a presentation
- AC2.2 Research and plan a presentation
- AC2.3 Select any equipment needed for the presentation
- AC2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience
- AC2.5 Obtain feedback on planned presentation and make adjustments, if required
- AC2.6 Produce presentation handouts
- AC2.7 Collect feedback on the written presentation
- AC2.8 Reflect on the feedback obtained of the written presentation and identify learning points
- AC2.9 Identify changes that will improve future written presentations

Unit 310

Develop a presentation

Supporting information

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">• letters• emails• memos
	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">• plans
	2.3–2.4 2.8–2.9	Evidence may be supplied via candidate reports/reflective accounts
	2.5 2.7	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• feedback received
	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">• handouts

Unit 311

Deliver a presentation

UAN:	T/601/2529
Level:	3
GLH:	15
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA623.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

Learning outcome

The learner will:

LO1 Understand the purpose of preparing for and evaluating a presentation

Assessment criteria

The learner can:

- AC1.1 Explain the purpose of using different types of presentation and equipment
- AC1.2 Explain different ways of delivering presentations and their features
- AC1.3 Explain the procedures to be followed when preparing a presentation
- AC1.4 Explain the benefits of preparing for giving a presentation
- AC1.5 Describe the types of problems that may occur with equipment and how to deal with them
- AC1.6 Explain the purpose and benefits of contingency planning
- AC1.7 Explain the purpose and benefits of collecting feedback from the audience on the presentation
- AC1.8 Explain the purpose and benefits of evaluating presentations and own performance

Learning outcome

The learner will:

LO2 Understand the techniques used in enhancing a presentation

Assessment criteria

The learner can:

- AC2.1 Explain and illustrate how presentations may be enhanced by materials and equipment
- AC2.2 Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills
- AC2.3 Describe how to gauge audience reaction to the presentation
- AC2.4 Explain the purpose and benefits of summarising important features of the presentation
- AC2.5 Describe the purpose and benefits of giving the audience opportunities to ask questions

Learning outcome

The learner will:

LO3 Be able to prepare for delivery of a presentation

Assessment criteria

The learner can:

- AC3.1 Select any equipment needed and plan how to use it to best effect
- AC3.2 Make contingency plans in case of equipment failure or other problems, if required
- AC3.3 Practise the presentation and its timing
- AC3.4 Obtain feedback on planned presentation and make adjustments, if required

Learning outcome

The learner will:

LO4 Be able to deliver a presentation

Assessment criteria

The learner can:

- AC4.1 Check equipment and resources
- AC4.2 Circulate presentation materials
- AC4.3 Introduce self to audience and state aims of the presentation
- AC4.4 Address the audience, speaking clearly and confidently, using language to suit the topic and audience
- AC4.5 Vary tone, pace and volume to emphasise key points

- AC4.6 Gauge audience reaction during the presentation and adapt if required
 - AC4.7 Summarise throughout the presentation to emphasise key points and help to maintain audience interest
 - AC4.8 Use body language in a way that reinforces presented information
 - AC4.9 Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur
 - AC4.10 Provide the audience with opportunities to ask questions
 - AC4.11 Listen carefully to questions and respond in a way that meets the audience's needs
-

Learning outcome

The learner will:

- LO5 Be able to evaluate a presentation

Assessment criteria

The learner can:

- AC5.1 Collect feedback on the presentation
- AC5.2 Reflect on own performance and identify learning points
- AC5.3 Evaluate the presentation and own performance and identify changes that will improve future presentations

Unit 311

Deliver a presentation

Supporting information

Evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1.	1.1–1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1–2.5	
3.	3.1–3.3	
	3.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
4.	4.1	Evidence may be supplied via candidate reports/reflective accounts
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• presentation materials
	4.3 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• presentation notes• handouts• slides
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• feedback• evaluation sheets

**Learning
outcomes****Assessment
criteria****Assessment guidance**

5.2–5.3

Evidence may be supplied via candidate reports/reflective accounts

Unit 312

Design and produce documents in a business environment

UAN:	M/601/2531
Level:	3
GLH:	25
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA212.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles.

Learning outcome

The learner will:

- LO1 Understand the purpose and value of designing and producing high quality and attractive documents

Assessment criteria

The learner can:

- AC1.1 Describe different types of documents that may be designed and produced and the different styles that could be used
- AC1.2 Describe different formats in which text may be presented
- AC1.3 Explain the purpose and benefits of designing and producing high quality and attractive documents

Learning outcome

The learner will:

- LO2 Know the resources available to design and produce documents and how to use them

Assessment criteria

The learner can:

- AC2.1 Describe the types of resources needed to design and produce high quality and attractive documents
 - AC2.2 Explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents
 - AC2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features
-

Learning outcome

The learner will:

- LO3 Understand the purpose and value of following procedures when designing and producing documents

Assessment criteria

The learner can:

- AC3.1 Explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents
 - AC3.2 Describe ways of researching and organising content needed for documents
 - AC3.3 Describe ways of integrating and laying out text and non-text
 - AC3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
 - AC3.5 Explain the purpose of storing documents safely and securely, and ways of doing so
 - AC3.6 Explain the purpose of confidentiality and data protection when preparing documents
 - AC3.7 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO4 Be able to design and produce documents to agreed specifications

Assessment criteria

The learner can:

- AC4.1 Agree the purpose, content, style and deadlines for documents
 - AC4.2 Identify and prepare resources needed to design and produce documents
 - AC4.3 Research and organise the content required for documents
 - AC4.4 Make appropriate and efficient use of technology, as required
 - AC4.5 Design, format and produce documents to an agreed style
 - AC4.6 Integrate non-text objects into an agreed layout, if required
 - AC4.7 Check texts and objects for accuracy
 - AC4.8 Edit and correct texts and objects as required
 - AC4.9 Clarify document requirements, if necessary
-

AC4.10 Store documents safely and securely following organisational procedures

AC4.11 Present documents to the required format, and within the agreed deadlines

Unit 312

Design and produce documents in a business environment

Supporting information

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">• letters• emails• memos
	4.9	
	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	4.5–4.8	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">• documents produced
	4.10–4.11	

Unit 313

Prepare text from notes using touch typing (60 wpm)

UAN:	T/601/2532
Level:	3
GLH:	10
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA216.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing different types of text using touch typing at a minimum speed of 60 words per minute.

Learning outcome

The learner will:

LO1 Understand the task of preparing text from notes using touch typing

Assessment criteria

The learner can:

- AC1.1 Describe different types of documents that may be produced from notes and the format to be followed
- AC1.2 Describe different forms in which texts may be presented
- AC1.3 Explain the difference between producing text from own notes and producing text from others' notes

Learning outcome

The learner will:

LO2 Understand the purpose and benefits of following procedures when preparing text using touch typing

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts
 - AC2.2 Explain the benefits of accuracy – including spelling, grammar and punctuation – when preparing typed text from notes
 - AC2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
 - AC2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so
 - AC2.5 Explain the purpose of confidentiality and data protection when preparing text from notes
 - AC2.6 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to prepare for tasks

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format and deadlines for texts
-

Learning outcome

The learner will:

- LO4 Be able to produce texts using touch typing at a minimum speed of 60wpm

Assessment criteria

The learner can:

- AC4.1 Input texts using touch typing to a minimum speed of 60 words per minute
- AC4.2 Format texts to agreed format making best use of available technology
- AC4.3 Clarify text requirements when necessary
- AC4.4 Read and check texts for accuracy
- AC4.5 Edit and correct texts, as required
- AC4.6 Store texts and original notes safely and securely following organisational procedures
- AC4.7 Present texts to the required format and within the agreed deadlines

Unit 313

Prepare text from notes using touch typing (60 wpm)

Supporting information

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.	2.1–2.6	
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">• letters• emails• memos
4.	4.1–4.2 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">• documents produced
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Unit 314

Prepare text from shorthand (80 wpm)

UAN:	A/601/2533
Level:	3
GLH:	45
Credit value	8
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD312.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing different types of text from shorthand notes at minimum speed of 80 words per minute.

Learning outcome

The learner will:

LO1 Understand the task of preparing text from shorthand

Assessment criteria

The learner can:

AC1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed

AC1.2 Describe different forms in which shorthand texts may be presented

Learning outcome

The learner will:

LO2 Understand the purpose and value of following procedures when preparing text from shorthand

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts prepared from shorthand
 - AC2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
 - AC2.3 Explain the purpose of storing text and original shorthand notes safely and securely, and ways of doing so
 - AC2.4 Explain the purpose of confidentiality and data protection when preparing text from shorthand notes
 - AC2.5 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to prepare for tasks, and use shorthand to take dictation

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format, and deadlines for texts
 - AC3.2 Take dictation using shorthand at a minimum of 80 words per minute
-

Learning outcome

The learner will:

- LO4 Be able to produce texts from shorthand

Assessment criteria

The learner can:

- AC4.1 Get clarification of points as required
 - AC4.2 Input and format texts to an agreed format from shorthand notes
 - AC4.3 Make efficient use of technology, as required
 - AC4.4 Read and check texts for accuracy
 - AC4.5 Edit and correct texts, as required
 - AC4.6 Store texts and original shorthand notes safely and securely following organisational procedures
 - AC4.7 Present texts to the required format, within the agreed deadlines
-

Unit 314

Prepare text from shorthand (80 wpm)

Supporting information

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">• letters• emails• memos
	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">• Shorthand notes
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">• documents produced

Unit 315

Prepare text from recorded audio instruction (60wpm)

UAN:	F/601/2534
Level:	3
GLH:	25
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD314.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing different types of text from audio recording at a minimum speed of 60 words per minute.

Learning outcome

The learner will:

LO1 Understand the task of preparing text from recorded audio instruction

Assessment criteria

The learner can:

- AC1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed
- AC1.2 Describe different forms in which texts may be presented
- AC1.3 Describe the different types of technology that are available for playing back recordings and their main features

Learning outcome

The learner will:

LO2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction

Assessment criteria

The learner can:

- AC2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
 - AC2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
 - AC2.3 Explain the purpose of storing text and original recordings safely and securely, and ways of doing so
 - AC2.4 Explain the purpose of confidentiality and data protection when preparing text from recorded audio
 - AC2.5 Explain the purpose and benefits of meeting deadlines
-

Learning outcome

The learner will:

- LO3 Be able to produce texts from audio recordings

Assessment criteria

The learner can:

- AC3.1 Agree the purpose, format, and deadlines for texts prepared from audio recordings
- AC3.2 Input text from an audio recordings at a minimum speed of 60 words per minute
- AC3.3 Format texts to agreed format making best use of available technology
- AC3.4 Clarify text requirements when necessary
- AC3.5 Read and check texts for accuracy
- AC3.6 Edit and correct texts, as required
- AC3.7 Store texts and original recording safely and securely following organisational procedures
- AC3.8 Present texts to the required format, within the agreed deadlines

Unit 315

Prepare text from recorded audio instruction (60wpm)

Supporting information

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 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	3.2–3.3 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">• documents produced

Unit 316

Support the design and development of an information system

UAN:	L/601/2536
Level:	3
GLH:	35
Credit value	7
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD111.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

- LO1 Understand the purpose of supporting the design and development of an information system

Assessment criteria

The learner can:

- AC1.1 Explain the purpose and value of contributing to the design and development of an information system
- AC1.2 Describe ways of contributing to the design and development of an information system

Learning outcome

The learner will:

- LO2 Understand how to contribute to the design and development of an information system

Assessment criteria

The learner can:

- AC2.1 Explain the purpose and value of contributing own user needs for an information system
 - AC2.2 Explain the benefits of developing a system specification based on user needs
 - AC2.3 Describe ways of contributing to the creation, design and development of an information system
 - AC2.4 Explain the purpose and value of contributing to the testing of an information system during design and development
-

Learning outcome

The learner will:

- LO3 Be able to contribute to the design and development of an information system

Assessment criteria

The learner can:

- AC3.1 Identify and agree the information to be managed
- AC3.2 Contribute to the design and development of an information system to meet agreed specification requirements
- AC3.3 Support system testing
- AC3.4 Identify and report faults
- AC3.5 Remedy faults, within limits of own authority

Unit 316

Support the design and development of an information system

Supporting information

Evidence requirements

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

Unit 317

Monitor information systems

UAN:	R/601/2537
Level:	3
GLH:	30
Credit value	7
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD131.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about monitoring and evaluating an information system to meet identified needs in a business environment.

Learning outcome

The learner will:

LO1 Understand how to monitor an information system

Assessment criteria

The learner can:

- AC1.1 Explain the purpose and benefits of managing information to meet requirements
- AC1.2 Explain the purpose and benefits of providing training and on-going support to users
- AC1.3 Explain the purpose of complying with legal and organisational requirements when using an information system
- AC1.4 Explain the purpose and benefits of monitoring use of an information system
- AC1.5 Describe ways of monitoring use of an information system
- AC1.6 Explain the purpose and benefits of maintaining and updating an information system
- AC1.7 Describe ways of maintaining and updating an information system
- AC1.8 Describe the types of problems that may occur with an information system and how to deal with them

Learning outcome

The learner will:

LO2 Understand how to review and further develop an information system

Assessment criteria

The learner can:

- AC2.1 Explain the purpose and benefits of continuously improving an information system
 - AC2.2 Explain how to identify problems in an information system and analyse them
 - AC2.3 Describe ways of resolving problems in an information system
-

Learning outcome

The learner will:

LO3 Be able to monitor an information system

Assessment criteria

The learner can:

- AC3.1 Identify the information to be monitored and the resources available to do so
- AC3.2 Contribute to designing a system specification
- AC3.3 Provide training on the use of an information system
- AC3.4 Provide on-going support to users
- AC3.5 Monitor use of an information system
- AC3.6 Make sure legal and organisational requirements for handling information are followed
- AC3.7 Make sure a system is maintained and updated, if required
- AC3.8 Identify, analyse and resolve problems when they occur
- AC3.9 Collect feedback on performance of an information system
- AC3.10 Provide information to enable further system development to meet agreed specifications

Unit 317

Monitor information systems

Supporting information

Evidence requirements

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

Unit 318

Analyse and report data

UAN:	Y/601/2538
Level:	3
GLH:	30
Credit value	6
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAD322.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about analysing and reporting data that meets the aims and objectives of the research.

Learning outcome

The learner will:

LO1 Understand how to organise and evaluate data that has been researched

Assessment criteria

The learner can:

- AC1.1 Describe purpose and benefits of organising data so that it can be analysed
- AC1.2 Explain how to evaluate the relevance, validity and reliability of data
- AC1.3 Explain how to analyse and prepare researched data so results will be accurate and free from bias
- AC1.4 Explain the differences between primary and secondary research methods
- AC1.5 Explain the differences between quantitative and qualitative research methods
- AC1.6 Describe how to search for relevant data sources

Learning outcome

The learner will:

LO2 Understand how to report data that has been researched

Assessment criteria

The learner can:

- AC2.1 Describe ways of reporting data so that it
 - a meets agreed aims and objectives
 - b is accurate and free from bias
-

Learning outcome

The learner will:

- LO3 Be able to analyse and evaluate data

Assessment criteria

The learner can:

- AC3.1 Organise data so that it can be analysed and reported
 - AC3.2 Select relevant, valid and reliable data to analyse
 - AC3.3 Apply analysis and evaluation techniques, as required
 - AC3.4 Review data to produce accurate, unbiased results and conclusions
 - AC3.5 Check the accuracy of the analysis, and make adjustments, if required
 - AC3.6 Obtain feedback on data analysis, if required
-

Learning outcome

The learner will:

- LO4 Be able to report data

Assessment criteria

The learner can:

- AC4.1 Present data in agreed format
- AC4.2 Present data to agreed timescale

Unit 318

Analyse and report data

Supporting information

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">• feedback obtained
4.	4.1–4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• data reported

Unit 319

Order products and services

UAN:	D/601/2539
Level:	3
GLH:	35
Credit value	5
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAF131.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand how to identify, select and negotiate the supply of products and services

Assessment criteria

The learner can:

- AC1.1 Identify different sources of information on products and services for an organisation
- AC1.2 Explain how to use different sources of information on products and services
- AC1.3 Describe how to write a specification for a product or service
- AC1.4 Identify sources of products and services that meet the quality expectations of an organisation
- AC1.5 Explain the purpose of selecting products and services that represent best value for money
- AC1.6 Describe how to negotiate best value for money
- AC1.7 Explain the purpose of developing and maintaining good relationships with suppliers, and ways of doing so
- AC1.8 Describe a supply chain and how it works

Learning outcome

The learner will:

- LO2 Understand organisational requirements and policies for the ordering and supply of products and services

Assessment criteria

The learner can:

- AC2.1 Describe the procedures for the ordering and supply of products and services for an organisation
- AC2.2 Describe the needs and priorities for the ordering and supply of products and services for an organisation
- AC2.3 Explain the purpose of having organisational policies for the acceptance of gifts and hospitality

Learning outcome

The learner will:

- LO3 Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of monitoring and evaluating procedures for the ordering and supply of products and services, and ways of doing so
- AC3.2 Describe actions that may be taken to improve efficiency in the ordering and supply of products and services
- AC3.3 Describe ways of getting better value for money for products and services provided

Learning outcome

The learner will:

- LO4 Be able to follow organisational procedures for the ordering and supply of products and services

Assessment criteria

The learner can:

- AC4.1 Use available information to keep up to date with products and services in own area of work
- AC4.2 Agree a budget and specification for products or services to be ordered
- AC4.3 Identify sources of products and services that meet the quality specification(s) of the organisation
- AC4.4 Select the product or service which represents best value for money

- AC4.5 Procure product(s) or service(s) following organisational procedures
 - AC4.6 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
 - AC4.7 Agree a contract for the supply of product(s) or service(s), within limits of own authority
-

Learning outcome

The learner will:

- LO5 Be able to maintain relationships with suppliers of products and services and deal with problems

Assessment criteria

The learner can:

- AC5.1 Take actions to create and maintain partnerships with suppliers to improve quality and cut costs, within limits of own authority
 - AC5.2 Monitor the performance of suppliers in line with the terms of the contract
 - AC5.3 Deal with problems as they occur, seeking support from others, where necessary
-

Learning outcome

The learner will:

- LO6 Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services

Assessment criteria

The learner can:

- AC6.1 Monitor the ordering and supply of products and services for effectiveness and efficiency
- AC6.2 Evaluate the ordering and supply of products and services and identify areas for improvement
- AC6.3 Suggest ways to improve effectiveness and efficiency and obtain better value for money for the supply of products and services

Unit 319

Order products and services

Supporting information

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.	3.1–3.3	
4.	4.1 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">• information used
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• budgets
	4.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• orders• delivery notes
	4.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	4.7	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• contract

Learning outcomes	Assessment criteria	Assessment guidance
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and professional discussion
	5.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records of monitoring
	5.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
6.	6.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records of monitoring
	6.2	Evidence may be supplied via candidate reports/reflective accounts and professional discussion
	6.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • appraisals • performance review

Unit 320

Plan and organise an event

UAN:	R/601/2540
Level:	3
GLH:	28
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA312.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about planning and organising an event.

Learning outcome

The learner will:

LO1 Understand the role of an event organiser in planning an event

Assessment criteria

The learner can:

AC1.1 Explain the purpose and benefits of planning an event

AC1.2 Explain the role of the event organiser in:

a meeting the objectives of the event

b agreeing a brief and budget for the event

AC1.3 Identify and evaluate the types of risks associated with events and explain how to minimise these

AC1.4 Explain the purpose and benefits of a contingency plan for an event

AC1.5 Describe the types of problems that may occur when organising an event and how to solve them

AC1.6 Categorise different types of events and their main features

Learning outcome

The learner will:

LO2 Understand the arrangements to be made when planning and organising an event

Assessment criteria

The learner can:

- AC2.1 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
-

Learning outcome

The learner will:

LO3 Understand the different types of venues and resources needed for different types of events

Assessment criteria

The learner can:

- AC3.1 Identify and evaluate different types of venue in terms of suitability for events and costs
- AC3.2 Describe a range of resources that may be needed for events and illustrate how they may be used
- AC3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event
-

Learning outcome

The learner will:

LO4 Be able to plan and organise an event

Assessment criteria

The learner can:

- AC4.1 Agree an event brief and budget
- AC4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies
- AC4.3 Identify and agree resources and support needed for organising an event
- AC4.4 Agree requirements for venue(s)
- AC4.5 Identify venue and agree costings
- AC4.6 Liaise with the venue to confirm event requirements and / or any special delegate requirements
- AC4.7 Agree requirements for resources
-

- AC4.8 Co-ordinate resources and production of event materials
- AC4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements
- AC4.10 Make sure legal and organisational requirements for contracts are met
- AC4.11 Make sure that all those involved are briefed and trained to fulfil their roles
- AC4.12 Delegate functions to the event team as required
- AC4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required
- AC4.14 Make sure invitations are sent out to delegates
- AC4.15 Manage delegate responses
- AC4.16 Prepare joining instructions and event materials to be sent to delegates

Unit 320

Plan and organise an event

Supporting information

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">• letters• emails• memos• briefs• budgets
	4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• plans
	4.3–4.16	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• event packs• training schedules

Unit 321

Co-ordinate an event

UAN:	Y/601/2541
Level:	3
GLH:	30
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA312.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about co-ordinating the delivery of an event.

Learning outcome

The learner will:

- LO1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief

Assessment criteria

The learner can:

- AC1.1 Explain the responsibilities of an event co-ordinator
AC1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief

Learning outcome

The learner will:

- LO2 Understand the activities required when co-ordinating an event

Assessment criteria

The learner can:

- AC2.1 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
- AC2.2 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

Learning outcome

The learner will:

LO3 Be able to co-ordinate an event

Assessment criteria

The learner can:

- AC3.1 Prepare the venue and make sure all necessary resources are in place
- AC3.2 Co-ordinate activities during an event, in line with agreed plans
- AC3.3 Help delegates to feel welcome
- AC3.4 Respond to delegates' needs throughout an event
- AC3.5 Resolve problems, as required
- AC3.6 Oversee the work of key staff during the event
- AC3.7 Monitor compliance with relevant health, safety and security requirements
- AC3.8 Liaise with the management of the venue to make sure facility resources are in place
- AC3.9 Arrange clearing, and vacating the venue according to the terms of the contract
- AC3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required
- AC3.11 Reconcile accounts to budget, if required
- AC3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant
- AC3.13 Agree key learning points and use these to improve the running of future events

Unit 321

Co-ordinate an event

Supporting information

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 3.12–3.13	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• event records
	3.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• budget• reconciliations

Unit 322

Plan and organise meetings

UAN:	D/601/2542
Level:	3
GLH:	25
Credit value	5
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA412.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

Learning outcome

The learner will:

- LO1 Understand the arrangements and actions required for planning and organising meetings

Assessment criteria

The learner can:

- AC1.1 Explain the role of the person planning and organising a meeting
- AC1.2 Describe the different types of meetings and their main features
- AC1.3 Explain how to plan meetings that meet agreed aims and objectives
- AC1.4 Explain the purpose of agreeing a brief for the meeting
- AC1.5 Explain how to identify suitable venues for different types of meetings
- AC1.6 Describe the types of resources needed for different types of meetings
- AC1.7 Outline the main points that should be covered by an agenda and meeting papers
- AC1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings
- AC1.9 Describe the health, safety and security requirements that need to be considered when organising meetings
- AC1.10 Explain the purpose and benefits of briefing the chair before a meeting
- AC1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required

- AC1.12 Describe the types of information, advice and support that may be need to be provided during a meeting
 - AC1.13 Describe the types of problems that may occur during a meeting and how to solve them
 - AC1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved
 - AC1.15 Explain how to record actions and follow up, if required
 - AC1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting
 - AC1.17 Describe how to agree learning points to improve the organisation of future meetings
-

Learning outcome

The learner will:

- LO2 Be able to prepare for a meeting

Assessment criteria

The learner can:

- AC2.1 Agree and prepare the meeting brief, checking with others, if required
 - AC2.2 Agree a budget for the meeting, if required
 - AC2.3 Prepare and agree an agenda and meeting papers
 - AC2.4 Organise and confirm venue, equipment and catering requirements, when necessary
 - AC2.5 Invite attendees, confirm attendance and identify any special requirements
 - AC2.6 Arrange catering, if required
 - AC2.7 Arrange the equipment and layout of the room, if required
 - AC2.8 Make sure the chair receives appropriate briefing
-

Learning outcome

The learner will:

- LO3 Be able to support running a meeting

Assessment criteria

The learner can:

- AC3.1 Welcome attendees and offer suitable refreshments (if required)
 - AC3.2 Make sure attendees have full set of papers
 - AC3.3 Make sure a person has been nominated to take minutes, if required
 - AC3.4 Provide information, advice and support when required
-

Learning outcome

The learner will:

LO4 How to follow up a meeting

Assessment criteria

The learner can:

- AC4.1 Produce a record of the meeting
- AC4.2 Seek approval for the meeting record, amend as required
- AC4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record
- AC4.4 Follow up action points, if required
- AC4.5 Evaluate meeting arrangements, and external services where used
- AC4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used
- AC4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support

Unit 322

Plan and organise meetings

Supporting information

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	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	2.4–2.6	
	2.8	
	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">• letters• emails• memos• budget
	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">• letters• emails• memos• agenda• meeting papers

Learning outcomes	Assessment criteria	Assessment guidance
	2.7	
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"> • letters • emails • memos • meeting papers
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"> • records
	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"> • letters • emails • memos
	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"> • evaluations

Unit 326

Contribute to innovation in a business environment

UAN:	A/601/2547
Level:	3
GLH:	30
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA112.
Endorsement by sector body	This unit has been developed by the Council for Administration.
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 outcome

The learner will:

LO1 Understand the purpose and benefits of innovation in a business environment

Assessment criteria

The learner can:

AC1.1 Explain the purpose of innovation as a way of staying competitive and offering new solutions

AC1.2 Explain the purpose of questioning existing ways of working in own area of work and assumptions about them

Learning outcome

The learner will:

LO2 Understand how to contribute to research, develop and review ideas for new approaches and solutions

Assessment criteria

The learner can:

- AC2.1 Explain the purpose of reviewing existing working methods, products or services
- AC2.2 Explain ways of reviewing existing working methods, products or services
- AC2.3 Identify sources of information for new approaches and solutions
- AC2.4 Describe ways of collecting information on possible improvements
- AC2.5 Explain the purpose of working with others when developing new approaches and solutions
- AC2.6 Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so
- AC2.7 Explain how to work with others to develop and agree an idea
- AC2.8 Explain how to decide when an idea is, or is not possible
- AC2.9 Explain the purpose of reviewing and learning from mistakes

Learning outcome

The learner will:

LO3 Understand how to present suggestions for new approaches and solutions

Assessment criteria

The learner can:

- AC3.1 Explain the purpose of selling ideas to decision-makers
- AC3.2 Describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome

Learning outcome

The learner will:

LO4 Be able to contribute to research and develop ideas

Assessment criteria

The learner can:

- AC4.1 Question constructively existing ways of working in own area of responsibility
- AC4.2 Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility
- AC4.3 Contribute to the collection of information that can be used to develop ideas for new approaches and solutions
- AC4.4 Agree criteria for evaluating ideas including fit with organisational aims and objectives

Learning outcome

The learner will:

LO5 Be able to present suggestion for new approaches and solutions

Assessment criteria

The learner can:

AC5.1 Present and sell suggestions for new approaches and /or solutions

AC5.2 Communicate risks to others in a suitable format

Learning outcome

The learner will:

LO6 Be able to evaluate, review and make suggestions for new approaches and solutions

Assessment criteria

The learner can:

AC6.1 Contribute to the evaluation of ideas for new approaches and solutions using

a fit with organisational aims and objectives

b other agreed criteria

AC6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services

AC6.3 Contribute to the selling of ideas to others

AC6.4 Seek feedback on ideas, analyse feedback. and show a willingness to compromise

AC6.5 Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach / solution is possible

Unit 326

Contribute to innovation in a business environment

Supporting information

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 discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• minutes of meetings• information collected• feedback given• reports• presentations
5.	5.1–5.2	
6.	6.1–6.5	

Unit 327

Contribute to running a project

UAN:	J/601/2549
Level:	3
GLH:	30
Credit value	5
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA151.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders.

Learning outcome

The learner will:

LO1 Understand how to contribute to agreeing to a project brief

Assessment criteria

The learner can:

- AC1.1 Describe the difference between routine work and taking part in a project
- AC1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate
- AC1.3 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
- AC1.4 Explain the purpose and benefits of identifying stakeholders involved in the project
- AC1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives
- AC1.6 Explain the purpose of agreeing a budget for a project
- AC1.7 Describe how to estimate types and quantity of resources needed to run a project
- AC1.8 Describe how to identify project risks and develop contingency plans, if required

Learning outcome

The learner will:

LO2 Understand how to contribute to a project

Assessment criteria

The learner can:

- AC2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information
- AC2.2 Describe how to estimate and control resources in an area of work during a project
- AC2.3 Explain the purpose of reporting own progress during a project
- AC2.4 Outline reasons for seeking advice in response to unexpected events
- AC2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales
- AC2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work
- AC2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly

Learning outcome

The learner will:

LO3 Understand the purpose of contributing to the evaluation of a project

Assessment criteria

The learner can:

- AC3.1 Describe different types of methods available to monitor projects
- AC3.2 Explain the purpose of making own contributions when evaluating projects
- AC3.3 Describe how to learn lessons for the future for own work

Learning outcome

The learner will:

LO4 Be able to contribute to preparing and planning a project

Assessment criteria

The learner can:

- AC4.1 Confirm the purpose of the project with all stakeholders
- AC4.2 Confirm project scope, timescale, aims and objectives
- AC4.3 Contribute to the preparation of a project specification
- AC4.4 Confirm all types of resources for all stakeholders
- AC4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work

AC4.6 Contribute to identifying risks and develop contingency plans for an area of work

Learning outcome

The learner will:

LO5 Be able to contribute to running a project

Assessment criteria

The learner can:

- AC5.1 Implement a project
 - AC5.2 Communicate with all stakeholders involved with or affected by a project
 - AC5.3 Adapt project plans for stakeholders to respond to unexpected events and risks
 - AC5.4 Provide interim reports on project progress to relevant stakeholders
 - AC5.5 Achieve required outcomes for relevant stakeholders on time and to budget
 - AC5.6 Seek advice in response to unexpected events, if required
 - AC5.7 Keep records of project activity
-

Learning outcome

The learner will:

LO6 Be able to contribute to evaluating the outcomes of a project

Assessment criteria

The learner can:

- AC6.1 Evaluate project for all stakeholders
- AC6.2 Report on the degree to which a project met its aims and objectives for all stakeholders
- AC6.3 Report on project strengths and areas for improvement for all stakeholders

Unit 327

Contribute to running a project

Supporting information

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

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

Learning outcomes	Assessment criteria	Assessment guidance
	5.4 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"> • letters • emails • memos • minutes of meetings • reports
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"> • letters • emails • memos • minutes of meetings
	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"> • letters • emails • memos • minutes of meetings • reports

Unit 328

Deliver, monitor and evaluate customer service to internal customers

UAN:	A/601/2550
Level:	3
GLH:	12
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAC121.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about providing and continuously improving services to internal customers.

Learning outcome

The learner will:

LO1 Understand the meaning of internal customer

Assessment criteria

The learner can:

AC1.1 Describe what is meant by internal customers

Learning outcome

The learner will:

LO2 Know the types of products and services relevant to internal customers

Assessment criteria

The learner can:

AC2.1 Describe the products and services offered by own organisation to internal customers

Learning outcome

The learner will:

- LO3 Understand how to deliver customer service that meets or exceeds internal customer expectations

Assessment criteria

The learner can:

- AC3.1 Explain the purpose and value of identifying internal customer needs and expectations
AC3.2 Explain why customer service must meet or exceed internal customer expectations
AC3.3 Explain the value of meeting or exceeding internal customer expectations
AC3.4 Explain the purpose and value of building positive working relationships
-

Learning outcome

The learner will:

- LO4 Understand the purpose of quality standards and timescales for delivering customer service

Assessment criteria

The learner can:

- AC4.1 Identify quality standards for own organisation and work
AC4.2 Explain the value of agreeing quality standards and timescales
AC4.3 Explain how to set and meet quality standards and timescales with internal customers
-

Learning outcome

The learner will:

- LO5 Understand how to deal with internal customer service problems

Assessment criteria

The learner can:

- AC5.1 Describe the types of problems that internal customers may have
AC5.2 Explain ways of dealing with problems
AC5.3 Explain the purpose and value of a complaints procedure, if applicable
-

Learning outcome

The learner will:

- LO6 Understand how to monitor and evaluate internal customer service and the benefits of this
-

Assessment criteria

The learner can:

- AC6.1 Explain the purpose and benefits of monitoring internal customer satisfaction and how to do so
 - AC6.2 Describe techniques for collecting and evaluating customer feedback
 - AC6.3 Explain the benefits of continuous improvement
-

Learning outcome

The learner will:

- LO7 Be able to build positive working relationships with internal customers

Assessment criteria

The learner can:

- AC7.1 Identify internal customers
 - AC7.2 Confirm internal customer needs in terms of products and services
 - AC7.3 Confirm internal customer needs in terms of quality standards and timescales
 - AC7.4 Agree procedures to be followed if internal customer needs are not met
-

Learning outcome

The learner will:

- LO8 Be able to deliver customer services to agreed quality standards and timescales

Assessment criteria

The learner can:

- AC8.1 Provide customer service(s) to agreed quality standards
 - AC8.2 Provide customer service(s) to agreed timescales
 - AC8.3 Check internal customer needs and expectations have been met
-

Learning outcome

The learner will:

- LO9 Be able to deal with internal customer service problems and complaints

Assessment criteria

The learner can:

- AC9.1 Follow procedures, within agreed timescale, to
 - a process problems and complaints
 - b resolve problems and complaints
 - c refer problems and complaints, where necessary
-

Learning outcome

The learner will:

LO10 Be able to monitor and evaluate customer services to internal customers

Assessment criteria

The learner can:

AC10.1 Obtain and record internal customer feedback

AC10.2 Analyse and evaluate internal customer feedback

AC10.3 Take action that will lead to improvement in customer service(s) to internal customers

Unit 328

Deliver, monitor and evaluate customer service to internal customers

Supporting information

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
	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: <ul style="list-style-type: none">• letters• emails• memos
8.	8.1–8.3	
9.	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies, candidate reports/reflective accounts
10.	10.1–10.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• feedback received

Unit 329

Deliver, monitor and evaluate customer service to external customers

UAN:	F/601/2551
Level:	3
GLH:	12
Credit value	3
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAC122.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about providing and continuously improving customer services to external customers.

Learning outcome

The learner will:

LO1 Understand the meaning of external customers

Assessment criteria

The learner can:

AC1.1 Describe what is meant by external customers

Learning outcome

The learner will:

LO2 Know the types of products and services relevant to external customers

Assessment criteria

The learner can:

AC2.1 Describe the products and services offered by the organisation to external customers

Learning outcome

The learner will:

- LO3 Understand how to deliver customer service that meets or exceeds external customer expectations

Assessment criteria

The learner can:

- AC3.1 Explain the purpose and value of identifying customer needs and expectations
AC3.2 Explain why customer service must meet or exceed customer expectations
AC3.3 Explain the value of meeting or exceeding customer expectations
AC3.4 Explain the purpose and value of building positive working relationships
-

Learning outcome

The learner will:

- LO4 Understand the purpose of quality standards and timescales for customer service to external customers

Assessment criteria

The learner can:

- AC4.1 Identify quality standards for own organisation and work
AC4.2 Explain the value of agreeing quality standards and timescales
AC4.3 Explain how to set and meet quality standards and timescales with external customers
-

Learning outcome

The learner will:

- LO5 Understand how to deal with customer service problems for external customers

Assessment criteria

The learner can:

- AC5.1 Describe the types of problems that external customers may have
AC5.2 Explain the consequences of not meeting external customer needs and expectations
AC5.3 Explain ways of dealing with external customer services problems
AC5.4 Explain the purpose and value of a complaints procedure
-

Learning outcome

The learner will:

LO6 Understand how to monitor and evaluate external customer service and the benefits of this

Assessment criteria

The learner can:

- AC6.1 Explain the purpose and benefits of monitoring external customer satisfaction and how to do so
- AC6.2 Describe techniques for collecting and evaluating external customer feedback
- AC6.3 Explain the benefits of continuous improvement

Learning outcome

The learner will:

LO7 Be able to build positive working relationships with external customers

Assessment criteria

The learner can:

- AC7.1 Identify external customers
- AC7.2 Confirm external customer needs in terms of products and services
- AC7.3 Confirm external customer needs in terms of quality standards and timescales
- AC7.4 Agree procedures to be followed if external customer needs are not met

Learning outcome

The learner will:

LO8 Be able to deliver external customer services to agreed quality standards and timescales

Assessment criteria

The learner can:

- AC8.1 Provide external customer service(s) to agreed quality standards
- AC8.2 Provide external customer service(s) to agreed timescales
- AC8.3 Check external customer needs and expectations have been met

Learning outcome

The learner will:

LO9 Be able to deal with customer service problems and complaints for external customers

Assessment criteria

The learner can:

- AC9.1 Follow procedures, within agreed timescale, to
- a process problems and complaints
 - b resolve problems and complaints
 - c refer problems and complaints, where necessary
-

Learning outcome

The learner will:

LO10 Be able to monitor and evaluate services to external customers

Assessment criteria

The learner can:

AC10.1 Obtain and record external customer feedback

AC10.2 Analyse and evaluate external customer feedback

AC10.3 Take actions that will lead to improvement in service(s) to external customers

Unit 329

Deliver, monitor and evaluate customer service to external customers

Supporting information

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
	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: <ul style="list-style-type: none">• letters• emails• memos
8.	8.1–8.3	
9.	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies, candidate reports/reflective accounts
10.	10.1–10.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• feedback received

Unit 330

Agree a budget

UAN:	J/601/2552
Level:	3
GLH:	25
Credit value	4
Assessment type:	Portfolio of evidence
Relationship to NOS	This unit directly relates to the Business and Administration NOS BAA531.
Endorsement by sector body	This unit has been developed by the Council for Administration.
Aim:	This unit is about developing and agreeing a budget for a department or section within a business.

Learning outcome

The learner will:

LO1 Understand how to develop budgets

Assessment criteria

The learner can:

AC1.1 Explain how to use estimations when developing a draft budget

AC1.2 Explain how to identify priorities and financial resources needed when preparing a budget

AC1.3 Explain the purpose and benefits of identifying priorities when preparing a budget

AC1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income

AC1.5 Describe procedures for negotiating superseded budgets

AC1.6 Describe skills needed for agreeing budgets

Learning outcome

The learner will:

LO2 Be able to agree a budget

Assessment criteria

The learner can:

- AC2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget
- AC2.2 Evaluate and justify costs and risks
- AC2.3 Prepare a draft budget
- AC2.4 Negotiate and agree a budget

Unit 330

Agree a budget

Supporting information

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">• draft budget
	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">• budget

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 [Centre document library](#) on www.cityandguilds.com or click on the links below:

Centre Handbook: Quality Assurance Standards

This document is for all approved centres and provides guidance to support their delivery of our qualifications. It includes information on:

- centre quality assurance criteria and monitoring activities
- administration and assessment systems
- centre-facing support teams at City & Guilds/ILM
- centre quality assurance roles and responsibilities.

The Centre Handbook should be used to ensure compliance with the terms and conditions of the centre contract.

Centre Assessment: Quality Assurance Standards

This document sets out the minimum common quality assurance requirements for our regulated and non-regulated qualifications that feature centre-assessed components. Specific guidance will also be included in relevant qualification handbooks and/or assessment documentation.

It incorporates our expectations for centre internal quality assurance and the external quality assurance methods we use to ensure that assessment standards are met and upheld. It also details the range of sanctions that may be put in place when centres do not comply with our requirements or actions that will be taken to align centre marking/assessment to required standards. Additionally, it provides detailed guidance on the secure and valid administration of centre assessments.

Access arrangements: When and how applications need to be made to City & Guilds

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 document library](#) also contains useful information on such things as:

- conducting examinations
- registering learners
- appeals and malpractice.

Useful contacts

Please visit the [Contact us](#) section of the City & Guilds website.

City & Guilds

For over 140 years, we have worked with people, organisations and economies to help them identify and develop the skills they need to thrive. We understand the life-changing link between skills development, social mobility, prosperity and success. Everything we do is focused on developing and delivering high-quality training, qualifications, assessments and credentials that lead to jobs and meet the changing needs of industry.

We partner with our customers to deliver work-based learning programmes that build competency to support better prospects for people, organisations and wider society. We create flexible learning pathways that support lifelong employability because we believe that people deserve the opportunity to (re)train and (re)learn again and again – gaining new skills at every stage of life, regardless of where they start.

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This Qualification Handbook however may contain references to historic information, such as former organisations, obsolete frameworks, codes or standards, or retired units and qualifications. This information is included for reference purposes only.

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Appendix 2 Matrix of evidence triangulated across units within each of the NVQ levels

The following tables have been designed by the Council for Administration to show the accumulation of assessment evidence that has been generated for completion of either part of or the whole unit, which may be triangulated to other units at the same level.

There are no units for which assessment evidence can be triangulated outside the level of the unit for which assessment evidence has been generated.

The tables have been organised identifying the units against the competence categories in which they reside.

The horizontal line of unit numbers in the tables are the initial units from which assessment evidence may be generated. The vertical line of units identifies those units for which the assessment evidence generated by the units in the top horizontal line of units may be triangulated to. For example, at Level 1, unit 101 in 'Core Business and Administration' may generate assessment evidence which can be triangulated to units, 102, 103 or 106.

Level 1 units

CfA NOS category	Core Business and Administration					Communications		Customer Service	Document Production	Health and Safety	Manage Information and Data	
	101	102	103	105	106	104	107	108	109	112	110	111
4428 unit no.												
101		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
102	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
103	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
104								✓				
106	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
110												✓

Level 2 units

CfA NOS category	Core Business and Administration					Business Resources		Communications				Customer Service			Document Production					Events and Meetings				Innovation and Change	Manage Information and Data				
	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	220	228
4428 unit 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	Management and Data			Project Management	
	#	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	318	327
4428 unit no.	#	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	318	327	
301	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
302	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
303	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
304	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
305	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
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