

SPECIFICATION

IAO Level 3 Diploma in Business Administration
Qualification number: 601/3516/5



Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

Active Leisure
Business and Management
Childcare
Employability
Retail

Health and Social Care
Hospitality and Catering
IT
Logistics
Education and Training

We currently offer over 120 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date

www.innovateawarding.org.

This document will be updated if there are any changes so it is important to make sure you are working from the most up-to-date version, which is available to download from our website.

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is an Ofqual-regulated Awarding Organisation in England.

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800

Email: contactus@innovateawarding.org

“We work with a wide variety of organisations such as employers, training providers, FE colleges and Sector Skills Councils and develop off-the-shelf, customised and bespoke qualifications.”

Qualification summary

Qualification Accreditation Number (QAN)	601/3516/5
Qualification review date	31 st March 2021
Guided Learning Hours (GLH)	Minimum 282 hours
Total Qualification Time (TQT)	580 hours
RQF level	3
Qualification credit value	58 credits
Minimum credits at/above level	40 credits
Assessment requirements	<p>Portfolio of Evidence</p> <p>This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).</p>
Aims and objectives of the qualification	<p>The aim of this qualification is to recognise learners' achievements within the business administration environment. It developed learners' understanding of the principles of processes of business administration across a broad range of occupational roles.</p> <p>This RQF competence-based qualification is designed for those people who are involved in Business and Administration as their primary work activity and are seeking to develop their career in Business Administration. This qualification was developed in consultation with employers to ensure the content is full and relevant to ensure learners are occupationally competent in the workplace.</p>
Entry guidance	<p>There are no formal entry requirements for this qualification.</p> <p>This qualification is suitable for those who work within a number of industries and job roles. It provides learners with an opportunity to demonstrate their competence and knowledge in a wide range of job roles.</p>

Progression opportunities

Learners who achieve this qualification could progress into or within employment in a number of business administration roles and/or continue their study in this or other areas. Learners who complete this qualification may go on to further study in related areas such as:

- Level 3 Certificate in Customer Service
- Level 3 NVQ Diploma in Sales

Funding

For details on eligibility for government funding please refer to the following websites:

<http://www.education.gov.uk/section96/>

<https://www.gov.uk/government/organisations/education-and-skills-funding-agency>

Innovate Awarding

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative...everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org

Feedback

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

Complaints

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint, then we recommend you read our Complaints Procedure which can be found on our website.

Fees

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

Enquiries and appeals

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

Data Protection

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

Equality and Diversity

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

Reasonable Adjustment and Special Consideration

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

Malpractice and Maladministration

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

Recognition of Prior Learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website

Please note the above is not a comprehensive guide to running qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

The Regulated Qualifications Framework (RQF)

What is the RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

Qualification Level

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

Qualification Size

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time to complete.

SKILLS CFA ASSESSMENT STRATEGY

Competence units (S/NVQ) for Business Administration, Customer Service and Management and Leadership

1. Introduction

This Assessment Strategy provides principles and guidance to Awarding Organisations for the assessment of competence-based units and qualifications (including Scottish Vocational Qualifications and National Vocational Qualifications) within Business Administration¹, Customer Service and Management and Leadership in England, Scotland, Wales and Northern Ireland.

This document outlines Skills CFA principles in regards to:

- external quality control of assessment
- requirements of assessor and verifiers
- evidence
- employer direct model

These principles are in addition to the generic criteria that Awarding Organisations must meet for delivery of qualifications as required by the qualification regulators, for example Ofqual's Regulatory Arrangements for the Qualifications and Credit Framework and any regulatory requirements specified by the SQA Accreditation.

This strategy should only be used for the assessment of competence-knowledge based units and qualifications. Awarding Organisations may assess knowledge-only units as they see fit.

2. External quality control of assessment

The quality of the assessment process is the responsibility of Awarding Organisations. However, Skills CFA encourages flexibility and innovation of approach, alongside robust systems to support quality control. Awarding Organisations are also encouraged to detail their approach to external verification, risk assessment and data requests.

2.1 External verification

- Awarding Organisations are responsible for the competence of external verifiers. It is the responsibility of Awarding Organisations to monitor centres' performance in accordance with regulatory requirements.
- Awarding Organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

¹ Or Business & Administration in Scotland

2.2 Risk assessment

- Awarding Organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.
- Awarding Organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.

2.3 Data requests

- Each quarter, Awarding Organisations must provide registration and achievement data at all qualification levels (1 to 7) and unit levels (where possible) to Skills CFA.

3. Requirements of assessors, external and internal verifiers

Candidates may be assessed, moderated or verified at work either by several appointed individuals.

a. Assessors

The primary responsibility of an Assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, Assessors must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. An Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.
- be "occupationally competent". Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.

- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

3.2 External quality assurer (EQA)²

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs must:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA³ and should be supported by a qualified EQA throughout their training period.
- be occupationally competent. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business.
- demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs.

3.3 Internal quality assurer (IQA)⁴

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical

² Also known as External Verifier (EV)

³ The need for countersigning the decisions of EQAs working towards a qualification, applies to England and Wales and not Scotland.

⁴ Also known as Internal Verifier (IV)

understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA.s

IQAs must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA⁵ and should be supported by a qualified IQA throughout their training period.
- be “occupationally competent. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business.
- demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

⁵ The need for countersigning the decisions of IQAs working towards a qualification, applies to England and Wales and not Scotland.

Evidence

4.1 Evidence from Workplace Performance

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge- based learning outcomes and assessment criteria of the competence units.
- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Simulation

- Simulation can be applied to all units listed in Appendix B.
- Where simulation is used for units at Level 2 and above, it should only form a small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.

4. Employer direct model

Skills CFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use the employer direct model:

- **An organisation must:**
 - have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**
 - seek guidance and approval from an awarding organisation to demonstrate that they have:

- appropriate processes in place to facilitate assessment, moderation or verification functions
- carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.
- agree the mapping process with the awarding organisation/body involved
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification
- **An Awarding Organisation must:**
 - offer this model to employers only
 - supply information on the requirements for internal and external moderation/verification activities to assessment centres.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual continual professional development (CPD) records that are maintained in assessment centres.

5. Appendix A – Realistic working environment guidelines

Realistic Working Environment (RWE) can be applied to all the units in Appendix B:

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

1. the RWE is managed as a real work situation
2. assessment must be carried out under realistic business pressures
3. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
4. candidates must be expected to achieve a volume of work comparable to normal business practices
5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available
6. account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units
8. customer perceptions of the RWE is similar to that found in the work situation being represented
9. candidates must show that their productivity reflects those found in the work situation being represented.

6. Appendix B – Simulation: a list of units

Simulation can only be applied to the following competence units:

Business Administration

Skills CFA	Unit title	Level
B&A 3	Work with others in a business environment	1
B&A 4	Health and safety in a business environment	1
B&A 5	Manage time and workload	1
B&A 6	Use a telephone and voicemail system	1
B&A 7	Prepare text from notes	1
B&A 8	Meet and welcome visitors in a business	1
B&A 9	Handle mail	1
B&A 10	Use office	1

Customer Service

Skills CFA	Unit title	Level
CS	Communication in customer service	1
CS	Record details of customer service problems	1
CS	Deal with customer queries, requests and problems	1

Management and Leadership

Skills CFA	Unit title	Level
M&L 17	Manage conflict within a team	3
M&L 31	Discipline and grievance management	4
M&L 44	Manage redundancy and redeployment	4

SKILLS CFA ASSESSMENT STRATEGY

2010 Sales Standards

Introduction

- 1.1 The Sales Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Sales NVQs / SVQs and competence-based qualifications.

External Quality Control

- 2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Sales NVQs / SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations/bodies will carry out standard risk assessments in each Sales NVQ / SVQ and competence based qualification assessment centre and manage all identified risks appropriately
- 2.3 Awarding organisations/bodies will consistently apply external verification processes at all Sales NVQ / SVQ and competence based qualification assessment centres, underpinned by standard risk assessment and risk management processes.
- 2.4 Awarding organisations/bodies will supply SkillsCFA with reports: Quarterly: provide registration and achievement data at qualification levels and unit level where possible.

Assessing performance

- 3.1 Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).
- 3.2 Units which have been imported by the CFA in their Sales NVQs / SVQs and competence based qualifications will be assessed in compliance with their relevant assessment strategies.

Simulation of NVQ / SVQ units

- 4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).
- 4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

Occupational expertise to assess performance, and moderate and verify assessments

5.1 Candidates must be assessed, moderated or verified at work either by:

a. Assessors, moderators or verifiers who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

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

- Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,
- Seek guidance and approval from an awarding organisation to demonstrate that the;
 - Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
 - Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model in Scotland.

5.2 Assessors must be occupationally competent to make Sales assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply information on the requirements for internal and external moderation / verification activities to Sales assessment centres.

5.5 The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. The CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

E-Skills assessment strategy

E-Skills - The Sector Skills Council for Business and Information Technology

ITQ Assessment Strategy England and Wales

This section sets out the ITQ assessment strategy appropriate for England and Wales. Arrangements for Scotland are published separately

ITQ Assessment Strategy

Introduction

Background to the new ITQ Framework

The 2008 development of the National Occupational Standards (NOS) for Using IT and this associated assessment strategy are a key tool in the planned delivery of the Sector Skills Agreement for IT (SSA).

The SSA is uniting employers, educators, government and others to create a coherent strategy for IT skills based on a common, employer-led plan of action, that will transform the IT skills landscape such that:

- All organisations in every sector will be fully realising the potential of IT to help drive their business goals, so that the UK is a world leader in its exploitation of IT for innovation, service and business competitiveness.
- All individuals in the UK will have - and will continue to develop - the IT user skills necessary to fully participate in the e-economy.
- IT user skills will enhance individuals' employability, social lives and ability to benefit from online services.

World class research cited in the Qualifying for the Information Age – the e-skills UK Sector Qualification and Learning Strategy⁶ (SQLS) identifies, that workers in virtually all occupations need to be able to use more sophisticated IT systems more effectively to create new sources of customer value. Users will not only need increased levels of skills in basic desk top technology; they will also increasingly need to be skilled in security management and IT support processes and tools, and also the use of communications and mobile technologies.

The SSA for IT sets out a clear target for stakeholders delivering and beneficiaries receiving better IT user skills:

A simplified, flexible framework for recognising achievement in IT skills operates across the UK, throughout both the education system and industry.

⁶ Available for download at: www.e-skills.com/SQLS

The SQLS, together with the associated Action Plan, designed to deliver on the SSA, identifies the following principle⁷ for delivering on this target:

Principle 4: The ITQ Framework will be used to organise and position learning and qualifications within the coherent environment. All IT user qualifications and learning will be recorded through a recognised Record of Achievement

This means that:

- 1 Available for download at: www.e-skills.com/SQLS
- 2 See SQLS (e-skills UK, 4th April 2008)

Credit frameworks

E-skills UK will derive units from the NOS in collaboration with Awarding Bodies to meet employers and learners needs and contribute to the ITQ.

Embedded Functional Skills [FS] within 14-19 curricula and qualifications

The revised IT User NOS embed the Functional Skills ICT [FS ICT] within the following three areas of competence that relate directly to FS ICT:

- IT User fundamentals [IUF:FS]
- IT Communication fundamentals [ICF:FS]
- IT Software fundamentals [ISF:FS]

Basic skills

The revised IT User NOS embed ICT Skills for Life and signpost opportunities for naturally occurring numeracy and literacy, within the three areas of competence with embedded FS.

Personal learning and thinking skills

The revised IT User NOS signpost opportunities for naturally occurring personal, learning and thinking skills [PLTS] within the three areas of competence with embedded Functional Skills [FS] and within the mandatory area of competence 'Improving productivity in using IT'.

'Full' level 2 qualification design principles

Eight trials with centres and learners commenced in 2007 for ICT Functional Skills in England. ICT Functional Skills standards have been defined from Entry 1 to Level 2. The ICT Functional Skills standards are comparable to the ICT Essential Skills standards in Northern Ireland and to the ICT Skills for Life standards in England.

The revised ITQ has been designed to take account of the proposed credit value of more than 13 credits for a full level 2 qualification.

Foundation Learning Tier

⁷ See SQLS (e-skills UK, 4th April 2008) page 5.

The revised ITQ framework has also been designed to take account of the proposed progression pathways for the Foundation Learning Tier, through allowing for the inclusion of FS Mathematics and English, and also for personal, learning and thinking skills [PLTS].

Principles of ITQ suite of qualifications

Three principles underpin the proposed ITQ suite of qualifications.

- 1 Flexibility of approach in response to sector, employer and learner needs:
 - for sectors – to tailor and contextualise IT training both to reflect the increasing diversity of job roles and the use of specific systems and software
 - for employers – to ensure skills application and development enables practical exploitation of the potential of IT for business improvement
 - for learners – to ensure they are equipped with the appropriate skills to support their personal or career development
- 2 Flexibility of content – to stimulate and inspire new learning and support progression, the ITQ offers a range of solutions varying in:
 - size – from taster courses and bite-sized units to full-time programmes of study level of complexity – from Entry Level to Level 3
 - content – incorporating a range of options for different IT systems and applications
- 3 Flexibility of assessment method as appropriate to the individual and the unit, which minimises the assessment burden for learners. The ITQ can therefore accommodate both:
 - electronic testing using simulation, tests and tasks
 - portfolio-based evidence demonstrating the application of skills, knowledge and understanding

Currently four progression pathways have been defined for FLT in England.

This assessment strategy is being developed in consultation with employers, training providers, awarding bodies and the regulatory authorities.

2.1 Scope of the assessment strategy

This assessment strategy applies to all units and qualifications that are aligned to the IT User NOS and accredited onto credit frameworks to be included in the final ITQ Framework (both directly and partly aligned). During the transition period, the assessment arrangements for existing 'contributing' units and NQF qualifications will apply.

2.2 Choice of assessment method

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. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of the activity, task, problem or question and the context in which it is set; the information input and output type and structure involved; and the IT tools, techniques or functions to be used.

Examples of recommended assessment methods are included in Annex A:

2.3 Mandatory unit assessment

In order to reflect the standards of competence expected by employers, assessment of the mandatory unit (Improving Productivity using IT) within Certificates and Diplomas must demonstrate that candidates can apply their relevant skills and knowledge to develop a specified outcome, product or solution. The candidate must independently determine, select and apply the necessary IT tools and techniques to achieve their goal.

The assessment design must cover the following aspects:

- Objectives for using IT – understanding the context in which IT is to be used or the conditions that may affect the way IT is to be used; understanding what outcome needs to be developed, and the expectations and requirements that the outcome must meet;
- Application of IT skills and knowledge – understanding what is involved in a piece of work and the best way to get it done;
- Evaluation of the use of IT – being able to evaluate the strengths and weaknesses of the use of IT, including identifying improvements to inform future work.

2.4 Accreditation of prior achievement (APA)

For candidates starting their studies towards the ITQ the process for accreditation of prior achievement is straightforward. Awarding bodies agree to mutual recognition of achievement, so that candidates will be able to count any relevant units towards the ITQ regardless of which awarding body issues the certificates.

Many people may have developed their skills in using IT through undertaking existing or 'legacy' accredited units, qualifications or from non-accredited units and employer training schemes, such as:

- the current ITQ, which is technically a Scottish or National Vocational Qualification [S/NVQ]
- Functional Skills ICT, ICT Skills for Life [Basic Skills] and in Essential Skills ICT (Northern Ireland);
- legacy units from VQs or VRQs accredited on the National Qualifications Framework (NQF) or accredited by the Scottish Qualifications Authority (SQA); vendor units and qualifications; and employer training schemes

The ITQ Framework lists which units or schemes can contribute to the ITQ, and whether there are any limits on counting credit from such achievement. The up-to-date ITQ Framework will be published on the e-skills UK website.

Acceptance of contributing qualifications is mandatory for all ITQ Awarding Bodies irrespective of the originating Awarding Body (AB). An Awarding Body offering ITQs must accept recognised units and qualifications from any other AB if the following conditions are met:

- the candidate presents the original qualification, unit certificate or other agreed record of achievement for inspection by the ITQ centre; and the unit was achieved no more than three years prior to the date of presentation to the centre. It is the responsibility of the AB and their centres to ensure that a representative sample of certificated skills and knowledge are still current.

Some approved contributing units entitle candidates to claim exemptions for more than one ITQ unit. In such cases, the candidate does not have to claim exemptions for all of the possible ITQ units unless he/she chooses to do so.

2.5 Progression

Candidates may carry forward credits for a period of 3 years to support progression from ITQ Award to ITQ Certificate and from ITQ Certificate to ITQ Diploma or from Level 1 to 2, or Level 2 to 3.

Candidates may not include the same unit at more than 1 level in any qualification. Thus a candidate who has completed, for example, both Word Processing at Level 1 (3 credits) and Word Processing at Level 2 (4 credits) may only count credits from the higher level towards the qualification.

2.6 Assessment roles and quality assurance

2.6.1 Assessors, internal and external moderators/verifiers

The new ITQs are not NVQs; therefore, there is no need for assessors to hold the A1 qualification, or for verifiers to hold the V1 qualification, or indeed to be working towards these qualifications.

To ensure the quality of assessment decisions, it is expected that awarding bodies will have in place methods to ensure that assessors, internal and external moderators/verifiers have:

- the necessary IT skills and experience to assess the units and qualifications they are making judgements on, such as demonstrated by holding an ITQ at level 3. Centres must maintain a current register of curriculum vitae (CVs), including reference to continuing professional development. e-skills UK do not require assessors, internal or external moderators/verifiers to hold assessor qualifications beyond those required by the awarding or regulatory body.

2.6.2 Standardisation, moderation and verification

Awarding Bodies must use quality assurance systems that are fit for purpose for the assessment method(s) being used and are in line with the relevant regulatory requirements. For example:

- internal/external moderation of externally set examinations or online tests;
- external moderation of externally set and internally marked tasks;
- records to authenticate candidate's evidence for assessment;
- internal standardisation/ external moderation of scenario-based assignments set by centres;
- internal moderation/verification of internally assessed evidence by a suitably qualified internal moderator/verifier using procedures approved by the awarding body; and
- external moderation/verification of internally assessed evidence by a suitably qualified external moderator/verifier using procedures specified by the awarding body

2.7 Joint Awarding Body Forum

Awarding Bodies, through the quality control mechanisms specified by the regulatory authorities, must ensure a rigorous and effective control of centres and the assessment and verification process so that judgement of what is valid, authentic, current, reliable and sufficient evidence is maintained across all assessment contexts.

To ensure consistency of assessment it is required that all Awarding Bodies routinely participate in the e-skills UK Joint Awarding Body Forum which will be the focus for ensuring that assessment and verification of competence is carried out consistently and fairly across all assessment contexts.

The Awarding Body Forum will, within the individual Awarding Bodies agreed methodologies, develop and maintain a common understanding of the standards and promote good assessment and verification practice.

Annex A

Guidance for Awarding Bodies on recommended assessment methods

The following methods are recommended for the assessment of IT User skills, knowledge and understanding for all ITQ units.

- e-assessment;
- knowledge tests;
- scenario-based assessment;
- portfolio of evidence taken from activities involving the use of contemporary ICT systems;
- witness testimony;
- professional discussion;
- other methods which have been approved by e-skills UK and the Awarding Body

Whatever method is used, Awarding bodies must have appropriate systems and procedures to:

- ensure that assessment arrangements meet relevant assessment design principles and quality assurance regulations; and make sample assessment materials available for discussion by the Joint Awarding Body Forum, as required

A.1 e-Assessment

Online or e-assessment may be used to assess some learning outcomes and assessment criteria relating to performance, knowledge and understanding, for example, of the performance skills in formatting text or understanding of the reasons for choosing different software tools. Awarding Bodies, employers or providers may develop e-assessments. Where e-assessment is used, Awarding Bodies must ensure that on each assessment occasion:

- the performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit;
- the level is sufficiently challenging; and
- the assessment methodology used is robust and reliable

Where employers or providers develop e-assessments, these should be agreed in advance with the Awarding Body.

A.2 Knowledge tests

Knowledge tests, often delivered electronically, can be used to assess some learning outcomes and assessment criteria relating to knowledge and understanding, for example, knowledge of security risks or organisational guidelines.

Awarding Bodies, employers or providers may develop knowledge tests. Where knowledge tests are used, Awarding Bodies must ensure that on each testing occasion:

- the knowledge being tested matches that specified in the relevant ITQ unit;
- the level is sufficiently challenging; and
- the assessment methodology used is robust and reliable

Where employers or providers develop knowledge tests, these should be agreed in advance with the awarding body.

A.3 Scenario based assessment

'Scenarios' may be developed to provide a purpose for using IT, which requires the candidate to undertake practical tasks or activities that produce assessable outcomes. Scenarios may be combined with other methods of assessment, for example to provide a purpose for a series of online assessment tasks.

Awarding Bodies, employers or providers may develop scenarios. The scenario and associated tasks must be carefully designed to ensure that:

- the performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit;
- the level is sufficiently challenging; and
- the demands and constraints result in the purposeful use of IT, and where relevant reflect those that would typically be met in a real work context

A.4 Portfolio assessment

Valid evidence can arise from:

- activities undertaken for or at work;
- the search for employment (e.g. CVs, job applications and emails to potential employers);
- social activities (e.g. club membership databases, posters and websites), such as:
- enterprise activities (e.g. business plans, budgets and marketing materials);
- voluntary activities (e.g. cash flows, programmes and newsletters); or
- learning and studying subjects other than IT (e.g. internet research for a geography assignment, reports/dissertations and presentations). By the very nature of IT, activities can be carried out in a variety of locations not confined to the traditional office setting.

Portfolio evidence should arise naturally from tasks and activities involving the use of IT and may include:

- product outcomes – in the form of outputs or screenshots produced using IT – which should form the majority of evidence; and
- ephemeral evidence – where this is the only evidence for an element (for example, of planning), should be cross checked by professional discussion and backed up by brief written evidence – for example in the form of annotations, storyboards or ‘witness statement’ (see below).

e-skills UK actively encourages the use of electronic portfolio management tools.

A.5 Witness statements

A ‘witness’ is someone who provides a written statement about the quality and authenticity of a candidate’s work for assessment purposes. To make a statement the witness must have first-hand experience of the candidate’s performance and understanding of knowledge, skills and understanding required to do the work. Witnesses can be drawn from a wide range of people who can attest to performance, including line managers and experienced colleagues from inside the candidate’s organisation.

A witness statement may be needed when the candidate is performing day-to-day activities, which leave little or no evidence behind, for example, agreeing the outcomes to be produced using IT and any deadlines that need to be met or understanding and meeting organisational guidelines for data security and file storage. The witness can, in particular, provide evidence relating to the candidate’s competence:

- when reviewing, testing and recommending ways of improving productivity using IT towards [IPU] the mandatory unit for ITQ Certificates and Diplomas;
- when using specialist or bespoke IT software applications;
- in meeting customer requirements; and
- of working within organisational guidelines

Abbreviations used in this section

AB Awarding Body

AoC Area of Competence

APA Accreditation of Prior Achievement

APL Accreditation of Prior Learning

CCEA Council for the Curriculum, Examinations and Assessment (Northern Ireland)

CQFW Credit and Qualification Framework for Wales

DCELLS Department for Children, Education, Lifelong Learning and Skills (Wales)

FLT Foundation Learning Tier

FS Functional Skills

FS ICT Functional Skills ICT

IPU Improving Productivity using IT (mandatory unit in ITQ Certificate and Diploma programmes)

NICATS Northern Ireland Credit Accumulation and Transfer System

NOS National Occupational Standards

NQF National Qualifications Framework

NVQ National Vocational Qualification

PLTS Personal Learning and Thinking Skills

QCA Qualifications and Curriculum Authority

QCF Qualifications and Credit Framework

RQF Regulated Qualification Framework

SCQF Scottish Credit and Qualification Framework

SQA Scottish Qualifications Authority

SQLS Sector Qualifications and Learning Strategy

SSA Sector Skills Agreement

SVQ Scottish Vocational Qualification

ULN Unique Learner Number

VQ Vocational Qualification

VRQ Vocationally Related Qualification

Qualification structure

To achieve a Level 3 Diploma in Business and Administration, learners must complete a **minimum of 58 credits**:

1. **27 credits** from **GROUP A MANDATORY UNITS**
2. A **minimum of 13 credits** from **GROUP B OPTIONAL UNITS**
3. A **maximum of 10 credits** from **GROUP C OPTIONAL UNITS**.
4. A **maximum of 8 credits** from **GROUP D OPTIONAL UNITS**

A **minimum of 40 credits** must be achieved through the completion of units at Level 3 or above.

The total Guided Learning Hours (GLH) for this qualification is 282 hours.

The Total Qualification Time (TQT) for this qualification is 580 hours.

Unit Structures

Mandatory units are listed below. For detailed information on Optional units, please contact Innovate Awarding by telephone or email:

Telephone: 0117 314 2800

Email: contactus@innovateawarding.co.uk

Mandatory units

Unit ref	Unit title	Credit Value	Level	GLH
Y/506/1910	Communicate in a business environment	4	3	24
T/506/2952	Manage personal and professional development	3	3	12
R/506/1940	Principles of business communication and information	4	3	27
Y/506/1941	Principles of administration	6	3	27
D/506/1942	Principles of business	10	3	74

Optional unit group B

Unit ref.	Unit title	Credit Value	Level	GLH
D/506/1911	Contribute to the improvement of business performance	6	3	33
H/506/1912	Negotiate in a business environment	4	3	18
K/506/1913	Develop a presentation	3	3	11
M/506/1914	Deliver a presentation	3	3	17
T/506/1915	Create bespoke business documents	4	3	23
A/506/1916	Contribute to the development and implementation of an information system	6	3	21
F/506/1917	Monitor information systems	8	3	43
J/506/1918	Evaluate the provision of business travel or accommodation	5	3	30
L/506/1919	Provide administrative support in schools	5	3	33
F/506/1920	Administer parking and traffic challenges, representations and civil parking appeals	5	3	31
R/506/1923	Administer statutory parking and traffic appeals	6	3	42
T/506/1932	Administer parking and traffic debt recovery	5	3	35
J/506/1935	Administer legal files	5	3	31
L/506/1936	Build legal case files	5	3	32
Y/506/1938	Manage legal case files	5	3	32
K/506/1944	Manage an office facility	4	3	21
M/506/1945	Analyse and present business data	6	3	24
Y/506/1809	Produce business documents	3	2	24
R/506/1811	Store and retrieve information	4	2	19

Y/506/1812	Produce minutes of meetings	3	2	13
D/506/1813	Handle mail	3	2	15
M/506/1816	Prepare text from shorthand	6	2	46
T/506/1817	Prepare text from recorded audio instruction	4	2	15
Y/506/2295	Maintain and issue stationery and supplies	3	2	18
L/506/1869	Contribute to the organisation of an event	3	2	23
D/506/1875	Organise business travel or accommodation	4	2	23
H/506/1876	Provide administrative support for meetings	4	2	28
T/506/1879	Administer human resource records	3	2	28
A/506/1883	Administer the recruitment and selection process	3	2	25
R/506/1887	Administer parking dispensations	3	2	25
R/506/1890	Administer finance	4	2	21
M/506/1895	Buddy a colleague to develop their skills	3	2	19
L/506/1905	Employee rights and responsibilities	2	2	16
R/506/1954	Support environmental sustainability in a business environment	4	4	38
D/506/1956	Resolve administrative problems	6	4	56
H/506/1957	Prepare specifications for contracts	4	4	23
K/506/1815	Prepare text from notes using touch typing	4	2	26

Optional unit group C

Unit ref.	Unit title	Credit Value	Level	GLH
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3	15
A/506/1821	Manage team performance	4	3	21
J/506/1921	Manage individuals' performance	4	3	20
L/506/1922	Manage individuals' development in the workplace	3	3	10
Y/506/1924	Chair and lead meetings	3	3	10
J/506/2292	Encourage innovation	4	3	14
M/506/1928	Procure products and/or services	5	3	35
T/506/1929	Implement change	5	3	28
K/506/1930	Implement and maintain business continuity plans and processes	4	3	25
F/506/1934	Participate in a project	3	3	19
J/506/1949	Develop and maintain professional networks	3	4	15
Y/506/1955	Develop and implement an operational plan	5	4	24
K/506/1989	Manage physical resources	4	4	26
K/506/1992	Prepare for and support quality audits	3	4	17
A/506/1995	Manage a budget	4	4	26
R/506/1999	Manage a project	7	4	38
L/506/2004	Manage business risk	6	4	27
R/506/2909	Recruitment, selection and induction practice	6	4	33
L/506/2150	Organise and deliver customer service	5	3	27

R/506/2151	Resolve customers' complaints	4	3	22
T/502/4301	Using email	3	3	20
Y/502/4629	Word Processing Software	6	3	45
Y/502/4632	Website Software	5	3	40
J/502/4626	Spreadsheet Software	6	3	45
T/502/4623	Presentation Software	6	3	45
J/502/4397	Bespoke Software	4	3	30
T/502/4556	Database Software	6	3	45

Optional unit group D

Unit ref	Unit title	Credit	Level	GLH
F/506/2596	Principles of leadership and management	8	3	50
K/502/9933	Principles of market research	5	3	40
T/502/9935	Principles of marketing and evaluation	7	3	50
F/502/9937	Principles of digital marketing and research	7	3	50
J/502/9938	Principles of marketing stakeholder relationships	3	3	16
Y/506/2152	Understand the customer service environment	5	3	40
D/506/1939	Understand the legal context of business	6	3	44
R/503/9324	Principles of Social Media within a Business	6	3	42

Barred units	
This unit	Is barred against this unit
Evaluate the provision of business travel or accommodation (J/506/1918)	Organise business travel or accommodation (D/506/1875)
Organise business travel or accommodation (D/506/1875)	Evaluate the provision of business travel or accommodation (J/506/1918)
Participate in a project (F/506/1934)	Manage a project (R/506/1999)
Manage a project (R/506/1999)	Participate in a project (F/506/1934)

Title:	Y/506/1910 Communicate in a business environment
Level:	3
Credit value:	4
GLH:	24
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand business communication models, systems and processes	1.1 Analyse the communication needs of internal and external stakeholders 1.2 Analyse the different communication models that support administration 1.3 Evaluate the effectiveness of different communication systems 1.4 Explain the factors that affect the choice of communication media 1.5 Explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications 1.6 Explain the factors to be taken into account in planning and structuring different communication media 1.7 Explain ways of overcoming barriers to communication 1.8 Explain the use of communications theories and body language 1.9 Explain proof-reading techniques for business communications
2. Be able to communicate in writing in business	2.1 Identify the purpose and audience of the information to be communicated 2.2 Select communication media that are appropriate to the audience and information to be communicated 2.3 Present information in the format, layout and style that is appropriate to the information to be communicated

	<p>2.4 Follow agreed business practices when communicating in writing</p> <p>2.5 Adapt the style and content of a communication, appropriate to specific audiences</p> <p>2.6 Present written communications that are clear, expressed in correct grammar and reflect what is intended</p> <p>2.7 Meet agreed deadlines in communicating with others</p>
3. Be able to communicate verbally in business	<p>3.1 Identify the nature, purpose, audience and use of the information to be communicated</p> <p>3.2 Use language that is correct and appropriate for the audience's needs</p> <p>3.3 Use appropriate body language and tone of voice to reinforce messages</p> <p>3.4 Identify the meaning and implications of information that is communicated verbally</p> <p>3.5 Confirm that a recipient has understood correctly what has been communicated</p> <p>3.6 Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to communicate in a business environment. Upon completion of this unit, learners will be able to communicate in business both in writing and verbally.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA613 Understand how to communicate in a business environment • CFABAA614 Prepare to communicate in a business environment • CFABAA615 Communicate in a business environment

Title:	T/506/2952 Manage personal and professional development
Level:	3
Credit value:	3
GLH:	12
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity 1.2 Identify trends and developments that influence the need for professional development 1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
2. Be able to fulfil a personal and professional development plan	2.1 Evaluate the benefits of personal and professional development 2.2 Explain the basis on which types of development actions are selected 2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis 2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives 2.5 Execute the plan within the agreed budget and timescale 2.6 Take advantage of development opportunities made available by professional networks or professional bodies
3. Be able to maintain the relevance of a personal and professional development plan	3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives

	3.2 Obtain feedback on performance from a range of valid sources 3.3 Review progress toward personal and professional objectives 3.4 Amend the personal and professional development plan in the light of feedback received from others
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage personal and professional development. Upon completion of this unit, learners will be able to identify personal and professional development requirements and fulfil a personal and professional development plan. Learners will also be able to maintain a personal and professional development plan ensuring its relevance.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LAA2 Develop your knowledge, skills and competence • CFAM&LAA1 Manage yourself

Title:	R/506/1940 Principles of business communication and information
Level:	3
Credit value:	4
GLH:	27
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand negotiation in a business environment	1.1 Explain the importance of negotiation in a business environment 1.2 Explain the features and uses of different approaches to negotiation 1.3 Identify the components of negotiation tactics
2. Understand how to develop and deliver presentations	2.1 Explain the different types of presentation and their requirements 2.2 Explain how different resources can be used to develop a presentation 2.3 Explain different methods of giving presentations 2.4 Explain best practice in delivering presentations 2.5 Explain how to collect and use feedback on a presentation
3. Understand how to create bespoke business documents	3.1 Explain the characteristics of bespoke documents 3.2 Explain the factors to be taken into account in creating and presenting bespoke documents 3.3 Explain the legal requirements and procedures for gathering information for bespoke documents 3.4 Explain techniques to create bespoke business documents 3.5 Explain how to gain approval of bespoke documents
4. Understand information systems in a business environment	4.1 Explain the typical stages of information system development

	<p>4.2 Analyse the benefits and limitations of different information systems</p> <p>4.3 Explain legal, security and confidentiality requirements for information systems in a business environment</p> <p>4.4 Explain how to monitor the use and effectiveness of an information system</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding the key principles of business communication and information. Upon completion of this unit, learners will have developed an understanding of a variety of business principles, including negotiation in a business environment, the development and delivery of presentations, the creation of bespoke business documents, and the use of information systems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	Y/506/1941 Principles of administration
Level:	3
Credit value:	6
GLH:	27
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to manage an office facility	1.1 Explain the legal requirements relating to the management of office facilities 1.2 Describe the typical services provided by an office facility 1.3 Explain how to establish office management procedures 1.4 Explain how to manage office resources 1.5 Explain techniques to monitor and manage work flows 1.6 Explain typical support and welfare facilities for office workers
2. Understand health and safety in a business environment	2.1 Explain the legal obligations of the employer for health and safety in the workplace 2.2 Explain an individual's responsibilities for health and safety in the workplace 2.3 Describe accident and emergency procedures
3. Understand how to take minutes of meetings	3.1 Explain the purpose of meeting minutes 3.2 Explain the legal implications of meeting minutes 3.3 Explain the importance of accuracy in minute taking 3.4 Describe what should and should not be included in different types of meeting minutes 3.5 Describe how to take notes during meetings

<p>4. Understand how to chair, lead and manage meetings</p>	<p>4.1 Explain the features and purpose of different types of formal and informal meeting</p> <p>4.2 Explain the role and responsibilities of the chair</p> <p>4.3 Explain the role of others in a meeting</p> <p>4.4 Explain techniques to facilitate a meeting</p> <p>4.5 Explain the information requirements of a meeting before, during and after a meeting</p>
<p>5. Understand how to supervise an administration team</p>	<p>5.1 Explain the use of targets and budgets to manage workloads</p> <p>5.2 Explain how to allocate work to individual team members</p> <p>5.3 Explain different quality management techniques to manage the performance of an administrative team</p> <p>5.4 Explain the techniques used to identify the need for improvements in team outputs and standards</p>
<p>6. Understand how to organise events</p>	<p>6.1 Explain the characteristics, requirements and purposes of different types of events</p> <p>6.2 Explain the types of information and information sources needed to organise an event</p> <p>6.3 Explain how to plan an event</p> <p>6.4 Explain how to identify the right resources from an event plan</p> <p>6.5 Describe the likely types of information needed by delegates before, during and after an event</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop knowledge and understanding regarding administration and introduces learners to the key principles of administration. Upon completion of this unit, learners will have developed an understanding of a variety of administration principles, including the management of an office facility, health and safety in a business environment, and the supervision of an administration team.</p>

	Learners will also present knowledge of minute taking, chairing, leading and managing meetings, and event organisation, and the use of information systems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	D/506/1942 Principles of business
Level:	3
Credit value:	10
GLH:	74
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand business markets	1.1 Explain the characteristics of different business markets 1.2 Explain the nature of interactions between businesses within a market 1.3 Explain how an organisation's goals may be shaped by the market in which it operates 1.4 Describe the legal obligations of a business
2. Understand business innovation and growth	2.1 Define business innovation 2.2 Explain the uses of models of business innovation 2.3 Identify sources of support and guidance for business innovation 2.4 Explain the process of product or service development 2.5 Explain the benefits, risks and implications associated with innovation
3. Understand financial management	3.1 Explain the importance of financial viability for an organisation 3.2 Explain the consequences of poor financial management 3.3 Explain different financial terminology
4. Understand business budgeting	4.1 Explain the uses of a budget 4.2 Explain how to manage a budget
5. Understand sales and marketing	5.1 Explain the principles of marketing 5.2 Explain a sales process 5.3 Explain the features and uses of market research

	5.4 Explain the value of a brand to an organisation 5.5 Explain the relationship between sales and marketing
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding business and introduces learners to the key principles of business. Upon completion of this unit, learners will develop an understanding of a variety of business principles, including business markets, business innovation and growth, and sales and marketing. Learners will also present knowledge of financial management and business budgeting.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Optional Units

Title:	D/506/1911 Contribute to the improvement of business performance
Level:	3
Credit Value:	6
GLH:	33
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of resolving business problems	1.1 Explain the use of different problem-solving techniques 1.2 Explain the organisational and legal constraints relating to problem-solving 1.3 Describe the role of stakeholders in problem-solving 1.4 Describe the steps in the business decision-making process 1.5 Analyse the implications of adopting recommendations and implementing decisions to solve business problems
2. Understand improvement techniques and processes	2.1 Describe the purpose and benefits of continuous improvement 2.2 Analyse the features, use and constraints of different continuous improvement techniques and models 2.3 Explain how to carry out a cost-benefit analysis 2.4 Explain the importance of feedback from customers and other stakeholders in continuous improvement
3. Be able to solve problems in business	3.1 Identify the nature, likely cause and implications of a problem 3.2 Evaluate the scope and scale of a problem

	<p>3.3 Analyse the possible courses of action that can be taken in response to a problem</p> <p>3.4 Use evidence to justify the approach to problem-solving</p> <p>3.5 Develop a plan and success criteria that are appropriate to the nature and scale of a problem</p> <p>3.6 Obtain approval to implement a solution to a problem</p> <p>3.7 Take action to resolve or mitigate a problem</p> <p>3.8 Evaluate the degree of success and scale of the implications of a solved problem</p>
4. Be able to contribute to the improvement of activities	<p>4.1 Identify the nature, scope and scale of possible contributions to continuous improvement activities</p> <p>4.2 Measure changes achieved against existing baseline data</p> <p>4.3 Calculate performance measures relating to cost, quality and delivery</p> <p>4.4 Justify the case for adopting improvements identified with evidence</p> <p>4.5 Develop standard operating procedures and resource plans that are capable of implementing agreed changes</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to contribute to the improvement of business performance. Upon completion of this unit, learners will have developed an understanding of the key principles associated with resolving business problems and an understanding of improvement techniques and processes. Learners will be able to apply this knowledge when solving problems in</p>

	business and when contributing to the improvement of business activities.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAH122 Assist in improving organisational performance

Title:	H/506/1912 Negotiate in a business environment
Level:	3
Credit Value:	4
GLH:	18
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party 2.6 Research the strengths and weaknesses of the other party
3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances 3.3 Maintain accurate records of negotiations, outcomes and agreements made 3.4 Adhere to organisational policies and procedures, and legal and ethical

	requirements when carrying out business negotiations
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to negotiate in a business environment and introduces learners to the principles underpinning negotiation. Upon completion of this unit, learners will be able to prepare for business negotiations and carry out business negotiations.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAG124 Negotiate in a business environment

Title:	K/506/1913 Develop a presentation
Level:	3
Credit Value:	3
GLH:	11
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to develop a presentation	1.1 Explain best practice in developing presentations 1.2 Explain who needs to be consulted on the development of a presentation 1.3 Explain the factors to be taken into account in developing a presentation 1.4 Analyse the advantages and limitations of different communication media
2. Be able to develop a presentation	2.1 Identify the purpose, content, style, timing and audience for a presentation 2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience 2.3 Tailor a presentation to fit the timescale and audience's needs 2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief 2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies 2.6 Develop materials that support the content of a presentation
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to develop a presentation. Upon completion of this unit, learners will understand best practice in developing presentations and will be able to develop a structured presentation.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA617 Develop a presentation

Title:	M/506/1914 Deliver a presentation
Level:	3
Credit Value:	3
GLH:	17
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles underpinning the delivery of presentations	1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations 1.2 Explain how the type and size of the audience affects the delivery of a presentation 1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations 1.4 Explain voice projection and timing techniques when delivering presentations 1.5 Explain the factors to be taken into account in responding to questions from an audience 1.6 Explain different methods for evaluating the effectiveness of a presentation
2. Be able to prepare to deliver a presentation	2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation 2.2 Develop contingency plans for potential equipment and resource failure 2.3 Take action to ensure that the presentation fits the time slot available

<p>3. Be able to deliver a presentation</p>	<p>3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience</p> <p>3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation</p> <p>3.3 Use body language in a way that reinforces messages</p> <p>3.4 Use equipment and resources effectively when delivering a presentation</p> <p>3.5 Deliver a presentation within the agreed timeframe</p> <p>3.6 Respond to questions in a way that meets the audience's needs</p> <p>3.7 Evaluate the effectiveness of a presentation</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to deliver a presentation. Upon completion of this unit, learners will be able to prepare for and deliver a presentation.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAA623 Deliver a presentation

Title:	T/506/1915 Create bespoke business documents
Level:	3
Credit Value:	4
GLH:	23
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to create bespoke business documents	1.1 Explain the use of bespoke business documents 1.2 Describe the factors to be taken into account in selecting the appropriate method of presenting a business document 1.3 Describe the use of technology to create bespoke business documents 1.4 Explain the purpose and requirements of corporate identity in bespoke business documents 1.5 Analyse different design techniques used to create attractive bespoke business documents 1.6 Explain the factors to be taken into account in evaluating the impact of bespoke business documents
2. Be able to design bespoke business documents	2.1 Confirm the purpose, nature, content, style, quality standards, audience and deadline of the document 2.2 Identify the optimum method of presenting the document 2.3 Create design options that meet the specification 2.4 Take into account feedback from stakeholders

3. Be able to create bespoke business documents	3.1 Include content that meets the brief, is accurate and grammatically correct 3.2 Use design techniques to create documents that meet the specification 3.3 Integrate non-text items into the agreed layout 3.4 Present documents within the agreed timescale
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to create bespoke business documents. Upon completion of this unit, learners will understand how to create bespoke business documents and will be able to apply this knowledge when designing and creating bespoke business documents.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA212 Design and produce documents in a business environment

Title:	A/506/1916 Contribute to the development and implementation of an information system
Level:	3
Credit Value:	6
GLH:	21
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the design and implementation of an information system	1.1 Explain the types of information to be managed by a system 1.2 Explain how information will be used and by whom 1.3 Explain who needs to be consulted in the design and implementation of an information system and why 1.4 Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system
2. Be able to contribute to the development of an information system	2.1 Confirm the purpose, use and features of an information system 2.2 Identify the information that will be managed by the system 2.3 Confirm requirements for reporting information 2.4 Recommend the functions that will be used to manipulate and report information 2.5 Develop guidance for the use of an information system that is accurate and easy to understand 2.6 Recommend user access and security levels for the information system 2.7 Make contributions to the development of an information system that are consistent with business

	<p>objectives and values and within budgetary constraints</p> <p>2.8 Participate in system tests in accordance with the specification</p>
3. Be able to contribute to the implementation of an information system	<p>3.1 Implement the information system in accordance with the plan, minimising disruption to business</p> <p>3.2 Confirm that staff are trained to use the system prior to its launch</p> <p>3.3 Resolve or report problems or faults with the information system within the limits of their own authority</p> <p>3.4 Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to contribute to the development and implementation of an information system. Upon completion of this unit learners will have developed an understanding of the design and implementation of an information system. Learners will be able to contribute to both the development and implementation of an information system.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD111 Support the design and development of information system

Title:	F/506/1917 Monitor information systems
Level:	3
Credit Value:	8
GLH:	43
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how information systems are used	1.1 Explain how the intended use of reports affects the choice of format and language 1.2 Explain how the audience of reports affects the choice of format and language 1.3 Explain the features of different problem-solving techniques related to information systems 1.4 Evaluate the suitability of possible problem-solving actions related to information systems 1.5 Explain techniques to validate the reliability of information 1.6 Analyse the suitability of different evaluation techniques related to information systems 1.7 Assess the potential consequences of breaches of confidentiality 1.8 Evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information
2. Be able to monitor information systems	2.1 Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements 2.2 Carry out monitoring activities in accordance with the plan

	<p>2.3 Provide training and support to system users that is appropriate to their needs</p> <p>2.4 Identify the cause of problems with an information system</p> <p>2.5 Suggest solutions to problems with an information system</p> <p>2.6 Recommend adaptations to the system in response to identified problems or developments</p> <p>2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when monitoring information systems</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to monitor information systems. Upon completion of this unit, learners will have an understanding of how information systems are used and will be able to monitor information systems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD131 Monitor information systems

Title:	J/506/1918 Evaluate the provision of business travel or accommodation
Level:	3
Credit Value:	5
GLH:	30
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the provision of business travel or accommodation arrangements	1.1 Explain the factors to be taken into account in setting evaluation criteria for the provision of business travel or accommodation 1.2 Explain different travel or accommodation-related needs and services 1.3 Explain different arrangements that could be made for the provision of business travel or accommodation 1.4 Explain the scope of legal and organisational security and confidentiality requirements relating to business travel or accommodation
2. Be able to evaluate the quality of organisational business travel or accommodation arrangements	2.1 Assess the performance of providers of travel or accommodation against agreed criteria 2.2 Identify instances of exceptional and inadequate performance 2.3 Evaluate the benefits and limitations of existing arrangements for organising business travel or accommodation and their implications 2.4 Identify alternative potential providers and ways of providing travel or accommodation

<p>3. Be able to recommend improvements to organisational business travel or accommodation arrangements</p>	<p>3.1 Produce costed plans that set out different options, their benefits, limitations and implications</p> <p>3.2 Shortlist alternative potential providers of business travel or accommodation against agreed criteria</p> <p>3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when recommending improvements to arrangements for business travel or accommodation</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to evaluate the provision of business travel or accommodation. Upon completion of this unit, learners will have developed an understanding of the provision of business travel or accommodation arrangements. Learners will utilise this knowledge when evaluating the quality of organisational business travel or accommodation arrangements and making recommendations for improvements.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA322 Organise business travel or accommodation

Title:	L/506/1919 Provide administrative support in schools
Level:	3
Credit Value:	5
GLH:	33
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand administration within a school environment	1.1 Analyse the scope, use and requirements of a school administrative system 1.2 Explain how their own role contributes to the achievement of a school's goals 1.3 Describe the policy context, issues and initiatives that affect the work of a school administrator 1.4 Explain a school's administration policy and procedures for dealing with others 1.5 Explain the requirements and procedures for dealing with child protection and student welfare 1.6 Explain when it may be appropriate to override the requirement to maintain confidentiality
2. Be able to provide administrative services	2.1 Build positive working relationships with others 2.2 Present a professional and friendly image in line with school policy 2.3 Coordinate the content and publishing of documents in accordance with the brief 2.4 Organise trips, events, placements, secondments or work experience in accordance with the brief 2.5 Maintain facilities to the required standard

	2.6 Adhere to organisational policies and procedures, and legal and ethical requirements when providing administrative services
3. Be able to operate school administrative systems and procedures	3.1 Maintain accurate records 3.2 Maintain the currency of registers, licences and contracts 3.3 Present reports and statistical returns on time in the agreed format 3.4 Select analysis and evaluation techniques that are appropriate to the purpose of the report and the nature of the information
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to provide administrative support in schools. Upon completion of this unit, learners will have developed an understanding of administration within a school environment and will be able to provide administrative services. Learners will also be able to operate school administrative systems and procedures.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAB141 Provide administrative support in schools

Title:	F/506/1920 Administer parking and traffic challenges, representations and civil parking appeals
Level:	3
Credit Value:	5
GLH:	31
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of parking and traffic challenges	1.1 Explain the provisions and constraints of relevant legislation, codes of practice, Traffic Regulation Orders and the Data Protection Act 1.2 Explain how to access, use and interpret the information needed to process challenges, representations and Civil Parking Notice (CPN) appeals 1.3 Evaluate the importance of keeping accurate and up to date records of information and decisions 1.4 Explain how to validate information in the administration of parking and traffic challenges 1.5 Explain the features and use of specialist software to process and record challenges, representations and CPN appeals 1.6 Explain the types of internal evidence needed to support reliable decisions for the administration of parking and traffic challenges 1.7 Explain when and why it may be appropriate to reactivate the enforcement process

<p>2. Be able to process the receipt of challenges, representations and CPN appeals</p>	<p>2.1 Record the receipt of written challenges, representations and CPN appeals</p> <p>2.2 Confirm that the information is complete, accurate, consistent and valid</p> <p>2.3 Decide whether to allow or uphold the appeal against recognised eligibility criteria</p> <p>2.4 Provide accurate advice and information on the progress and outcome of the case</p>
<p>3. Be able to respond to challenges, representations and CPN appeals</p>	<p>3.1 Confirm that the information is complete, accurate, consistent and valid</p> <p>3.2 Suspend the enforcement process while cases are being investigated</p> <p>3.3 Obtain additional evidence where gaps are identified</p> <p>3.4 Seek appropriate advice on cases beyond their level of authority</p> <p>3.5 Refer cases beyond their level of authority to the right person</p> <p>3.6 Inform customers of the decision and possible courses of action they can take within the agreed timescale</p> <p>3.7 Adhere to organisational policies and procedures, and legal and ethical requirements when responding to challenges, representations and CPN appeals</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to administer parking traffic challenges, representations and civil parking appeals. Upon completion of this unit, learners will have an understanding of the administration of parking and traffic challenges. Learners will be able to process the receipt of, and respond to,</p>

	challenges, representations and Civil Parking Notice appeals.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFASPA2 Administer parking and traffic challenges, representations and parking charge notice appeals

Title:	R/506/1923 Administer statutory parking and traffic appeals
Level:	3
Credit Value:	6
GLH:	42
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of statutory parking and traffic appeals	1.1 Explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act 1.2 Explain the grounds on which someone may appeal and on which they may file a statement of truth 1.3 Explain the evidence needed to carry out an investigation 1.4 Explain how to validate information for statutory parking and traffic appeals 1.5 Explain the requirements for preparing and presenting a case summary 1.6 Explain the preparations and codes of conduct relating to attending a hearing for statutory parking and traffic appeals 1.7 Describe the actions needed to close a case and refund fees 1.8 Explain who needs to be informed of the outcomes of a statutory appeal and why 1.9 Explain the features of specialist software to process and record statutory appeals 1.10 Explain the potential consequences of not acting within the given deadline 1.11 Explain when and why an appeal may be referred by an adjudicator to an

	<p>independent person to consider mitigation</p> <p>1.12 Explain the actions needed to reactivate the recovery process after the failure of statutory parking and traffic appeals</p>
2. Be able to prepare case evidence for statutory parking and traffic appeals	<p>2.1 Record the receipt of statutory appeal notifications or revocation orders</p> <p>2.2 Confirm that the information is accurate and consistent</p> <p>2.3 Notify the right person of any discrepancies</p> <p>2.4 Meet the requirements of the deadline</p>
3. Be able to investigate cases for statutory appeals	<p>3.1 Confirm that the information supplied is accurate, valid and reliable</p> <p>3.2 Obtain additional evidence where gaps are identified</p> <p>3.3 Refer cases beyond their own level of authority to the right person</p> <p>3.4 Make and record decisions in statutory appeal cases on the basis of the evidence provided</p> <p>3.5 Keep the adjudicator and appellant or respondent informed of progress and outcomes</p> <p>3.6 Adhere to organisational policies and procedures, and legal and ethical requirements when investigating cases for statutory appeals</p>
4. Be able to contest statutory parking and traffic appeals	<p>4.1 Prepare a case summary in accordance with organisational guidelines and codes of practice</p> <p>4.2 Collate, label and present documentation in the format required by the appeals service</p> <p>4.3 Respond promptly to requests for further information</p> <p>4.4 Inform everyone who needs to know of the outcomes of a statutory appeal</p> <p>4.5 Keep accurate records of information and decisions made</p>

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to administer statutory parking and traffic appeals. Upon completion of this unit, learners will have an understanding of the administration of statutory parking and traffic appeals. Learners will be able to apply this knowledge when preparing case evidence for statutory parking and traffic appeals, investigating cases, and contesting statutory parking and traffic appeals.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFASPA3 Administer statutory parking and traffic appeals

Title:	T/506/1932 Administer parking and traffic debt recovery
Level:	3
Credit Value:	5
GLH:	35
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the parking and traffic debt recovery process	1.1 Explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act 1.2 Explain the criteria, policy and procedures relating to debt recovery 1.3 Analyse the role of the Traffic Enforcement Centre and magistrates' court in the debt recovery process 1.4 Explain the requirements of debt recovery documentation 1.5 Explain the features and benefits of different investigation techniques 1.6 Explain who needs to be informed of the outcomes of the debt recovery process and why 1.7 Explain the actions to be taken at each stage of the debt recovery process 1.8 Explain the potential consequences of an inadequate audit trail 1.9 Explain the actions needed to close a debt recovery case

<p>2. Be able to administer the parking and traffic debt recovery process</p>	<p>2.1 Monitor the quality of the data to be registered at the Traffic Enforcement Centre or magistrates' court</p> <p>2.2 Serve debt recovery documentation in accordance with organisational policy and relevant legislation</p> <p>2.3 Prepare case evidence in accordance with organisational policy and relevant legislation</p> <p>2.4 Make decisions on the basis of the evidence within the limits of their own authority</p> <p>2.5 Inform everyone who needs to know of the progress and outcomes of the case</p> <p>2.6 Monitor the performance of debt recovery agents</p> <p>2.7 Take prompt action in the event of problems arising in the debt recovery process</p> <p>2.8 Keep accurate and up-to-date records of actions and decisions taken</p> <p>2.9 Adhere to organisational policies and procedures, and legal and ethical requirements when administering the parking and traffic debt recovery process</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to administer parking and traffic debt recovery. Upon completion of this unit, learners will have an understanding of the parking and traffic debt recovery process and learners will be able to apply this knowledge when administering the parking and traffic debt recovery process.</p>

Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFASPA4 Administer parking and traffic debt recovery

Title:	J/506/1935 Administer legal files
Level:	3
Credit Value:	5
GLH:	31
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of legal files	1.1 Explain the administrative requirements of the different legal areas being administered 1.2 Explain the scope and limits of their own responsibilities and authority 1.3 Explain the requirements of the duty of confidentiality 1.4 Explain the use of specialist software for processing legal cases 1.5 Explain the potential consequences of inadequate or inaccurate record keeping 1.6 Describe the organisational and regulatory purpose and nature of different legal checks and searches 1.7 Explain the organisational and regulatory purpose of a client care letter 1.8 Explain how records of time spent on work are used
2. Be able to maintain a legal file	2.1 Confirm that information on file is complete, accurate and valid 2.2 Process money received from clients in accordance with organisational and regulatory requirements 2.3 Keep fee-earners informed of actions taken, progress, developments and problems

	<p>2.4 Take action to ensure that files are correctly labelled and dated including summaries of their contents</p> <p>2.5 Generate correspondence that conform with the requirements of house style</p> <p>2.6 Record all time spent, costs and disbursements accurately</p> <p>2.7 Generate accurate bills that conform with organisational and regulatory requirements</p> <p>2.8 Adhere to organisational policies and procedures, and legal and ethical requirements when maintaining a legal file</p>
3. Be able to close and archive a legal file	<p>3.1 Address any outstanding issues for a legal file</p> <p>3.2 Prepare accurate final bills in accordance with organisational and regulatory requirements</p> <p>3.3 Take action to ensure that closed files contain all the necessary documentation</p> <p>3.4 Confirm whether any documents need to be added to the firm's precedent, knowledge or data bank</p> <p>3.5 Close files in accordance with organisational standards and procedures when the account shows a nil balance</p> <p>3.6 Archive files in accordance with organisational and regulatory requirements</p>
Additional information about this unit N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to administer legal files. Upon completion of this unit, learners will have developed an understanding of the administration of legal files and will be able to maintain, close, and archive a legal file.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAB111 Administer legal files

Title:	L/506/1936 Build legal case files
Level:	3
Credit Value:	5
GLH:	32
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to build legal case files	1.1 Explain the administrative requirements of the different legal areas being administered 1.2 Explain the scope and limits of their own responsibilities and authority 1.3 Explain the requirements of the duty of confidentiality 1.4 Explain how to identify shortfalls in evidence and materials 1.5 Explain the features and uses of different interviewing techniques 1.6 Explain the use of specialist software for processing legal cases 1.7 Explain how to access and use sources of information and evidence 1.8 Explain the potential consequences of not meeting deadlines when building a legal case file
2. Be able to build case files	2.1 Identify gaps in evidence and materials needed 2.2 Carry out interviews in accordance with the principles of best practice in communication and interviewing 2.3 Obtain evidence and materials needed to complete the file 2.4 Generate correspondence that conforms with the house style and regulatory requirements

	2.5 Submit cases on time in line with internal and external deadlines 2.6 Complete follow-up actions in accordance with the instructions 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when building case files
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to build legal case files. Upon completion of this unit, learners will understand how to, and be able to, build legal case files.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAB112 Build case files

Title:	Y/506/1938 Manage legal case files
Level:	3
Credit Value:	5
GLH:	32
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of legal case files	1.1 Explain the administrative requirements of the different legal areas being administered 1.2 Explain the scope and limits of their own responsibilities and authority 1.3 Explain the requirements of the duty of confidentiality 1.4 Describe the structure, format and contents of a case file 1.5 Explain how to validate information when managing a legal case file 1.6 Explain the requirements of processing appeals 1.7 Explain the potential consequences of not meeting internal and external deadlines when managing a legal case file
2. Be able to manage case files	2.1 Plan the management of a case file to meet deadlines 2.2 Identify the location of required documents and materials 2.3 Take action to ensure the file contains accurate and up-to-date information, documents and materials and is secure 2.4 Take action to ensure court bundles are prepared correctly 2.5 Generate correspondence and documents that conform with the

	<p>requirements of house style and legal and procedural requirements</p> <p>2.6 Submit documents on time</p> <p>2.7 Process and record the hearing outcomes in accordance with organisational and procedural requirements</p> <p>2.8 Close and archive files in accordance with organisational and regulatory requirements</p> <p>2.9 Keep fee-earners informed of actions taken, progress, developments and problems</p> <p>2.10 Adhere to organisational policies and procedures, and legal and ethical requirements when managing case files</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage legal case files. Upon completion of this unit, learners will understand how to, and be able to, manage legal case files.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • BAB113 Manage case files

Title:	K/506/1944 Manage an office facility
Level:	3
Credit Value:	4
GLH:	21
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of an office facility	1.1 Explain the requirements of establishing and implementing office management procedures 1.2 Explain how to manage the effectiveness of work and systems 1.3 Explain how to manage any constraints attached to office facilities and related budgets 1.4 Explain the factors to be taken into account in the design of office systems, procedures and guidance documents 1.5 Explain how to create an environment that is conducive to productive work
2. Be able to manage and maintain an office facility	2.1 Maintain equipment and consumables to agreed levels 2.2 Establish systems to evaluate the effectiveness of office systems and procedures 2.3 Review the effectiveness of office systems and procedures to meet users' needs, adapting them to meet changing demands 2.4 Manage the maintenance of office equipment to meet users' needs and expectations 2.5 Manage effective relationships with suppliers

	2.6 Take action to ensure that administrative services are provided to agreed standards
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage an office facility. Upon completion of this unit, learners will have developed an understanding of the management of an office facility and will be able to apply this when managing and maintaining an office facility.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA118 Manage an office facility

Title:	M/506/1945 Analyse and present business data
Level:	3
Credit Value:	6
GLH:	24
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the analysis and presentation of business data	1.1 Explain the uses and limitations of primary and secondary data 1.2 Explain the uses and limitations of quantitative and qualitative data 1.3 Evaluate the issues relating to the validity and reliability of data and its analysis 1.4 Explain the use of IT tools to carry out research 1.5 Assess the risks attached to making judgments based on limited or unrepresentative samples 1.6 Assess the risks attached to generalizing research findings 1.7 Explain different formats and techniques for the presentation of the analysis
2. Be able to analyse quantitative and qualitative business data	2.1 Agree the parameters of the analysis 2.2 Clarify any ethical requirements of the analysis 2.3 Organise the data in a way that will facilitate its analysis 2.4 Select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives 2.5 Apply analytical techniques that are appropriate to the purpose of the research and the nature of the data

	2.6 Confirm the accuracy of data analysis and make necessary adjustments 2.7 Draw conclusions that are valid and supported by evidence
3. Be able to present the analysis of business data	3.1 Present data in the agreed reporting format and house style 3.2 Acknowledge the limitations of the analysis 3.3 Reference data sources
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to analyse and present business data. Upon completion of this unit, learners will have developed an understanding of the analysis and presentation of business data. Learners will be able to analyse both quantitative and qualitative business data and will also be able to present this analysis appropriately.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD322 Analyse and report data

Title:	Y/506/1809 Produce business documents
Level:	2
Credit Value:	3
GLH:	24
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to prepare business documents	1.1 Explain the requirements for language, tone, image and presentation for different documents 1.2 Explain how to integrate images into documents 1.3 Describe how corporate identity impacts upon document production 1.4 Explain the requirements of data protection, copyright and intellectual property legislation relating to document production 1.5 Describe organisational procedures for version control 1.6 Describe security requirements relating to document production
2. Be able to prepare business documents	2.1 Identify the purpose, audience, content, style, format and deadlines of a document 2.2 Use document production resources in line with organisational guidelines 2.3 Use correct grammar, spelling, punctuation and sentence structure 2.4 Produce documents that meet the requirements within the agreed timescale

3. Be able to distribute business documents	3.1 Provide final documents in the appropriate medium for authorised readers 3.2 Specify restrictions and distribution lists in accordance with the requirements 3.3 Maintain the requirements of security in the production, distribution and storage of documents
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to produce business documents. Upon completion of this unit, learners will be able to prepare and distribute business documents.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA211 Produce documents in a business environment
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	R/506/1811 Store and retrieve information
Level:	2
Credit Value:	4
GLH:	19
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand information storage and retrieval	1.1 Describe systems and procedures for storing and retrieving information 1.2 Outline legal and organisational requirements for information security and retention 1.3 Explain how to create filing systems to facilitate information identification and retrieval 1.4 Explain how to use different search techniques to locate and retrieve information 1.5 Describe what to do when problems arise when storing or retrieving information
2. Be able to gather and store information	2.1 Gather the information required within the agreed timescale 2.2 Store files and folders in accordance with organisational procedures 2.3 Store information in approved locations 2.4 Adhere to organisational policies and procedures, legal and ethical requirements
3. Be able to retrieve information	3.1 Confirm information to be retrieved and its intended use 3.2 Retrieve the required information within the agreed timescale
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to store and retrieve information. Upon completion of this unit, learners will be able to gather, store and retrieve information.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD332 Store and retrieve information using a filing system
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	Y/506/1812 Produce minutes of meetings
Level:	2
Credit Value:	3
GLH:	13
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to take minutes of meetings	1.1 Explain the purpose of different types of minutes and other meeting records 1.2 Explain the legal requirements of formal minutes 1.3 Describe organisational conventions for producing minutes 1.4 Describe the responsibilities of the minute taker in a meeting 1.5 Explain why it is important to maintain confidentiality of meetings, discussions and actions 1.6 Explain why it is necessary to record who proposed and seconded suggestions and changes
2. Be able to take notes of meetings	2.1 Take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings 2.2 Record allocated responsibilities for agreed actions

<p>3. Be able to produce minutes of meetings</p>	<p>3.1 Transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style</p> <p>3.2 Include agreed attachments or appendices</p> <p>3.3 Obtain approval for the final documents</p> <p>3.4 Distribute minutes to the agreed distribution list</p> <p>3.5 Maintain the requirements of confidentiality</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to produce minutes of meetings. Upon completion of this unit, learners will be able to take notes of meetings and then produce minutes of meetings.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAA441 Take minutes
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	D/506/1813 Handle Mail
Level:	2
Credit Value:	3
GLH:	15
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to deal with mail	1.1 Explain how to deal with “junk” mail 1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail 1.3 Describe how to operate a franking machine 1.4 Explain how to prepare packages for distribution 1.5 State organisational policies and procedures on mail handling, security and the use of courier services 1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures
2. Be able to deal with incoming mail	2.1 Sort incoming mail in line with organisational procedures 2.2 Distribute incoming mail and packages to the right people according to the agreed schedule 2.3 Deal with incorrectly addressed and “junk” mail in accordance with organisational procedures
3. Be able to deal with outgoing mail	3.1 Organise the collection of outgoing mail and packages on time 3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item 3.3 Dispatch outgoing mail on time
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to handle mail. Upon completion of this unit, learners will be able to deal with both incoming and outgoing mail.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA612 Handle mail
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	M/506/1816 Prepare text from shorthand
Level:	2
Credit Value:	6
GLH:	46
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to use shorthand to create text	1.1 Explain the importance of confirming the purpose of the text and intended audience 1.2 Describe techniques that may be used when taking shorthand notes 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.4 Explain how technology features can help to create, format and check the accuracy of text 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to use shorthand to prepare text	2.1 Agree the purpose, format and deadlines for texts 2.2 Take dictation using shorthand at the speed required by the organisation 2.3 Input and format text from shorthand notes 2.4 Check that text is accurate and the meaning is clear and correct 2.5 Store texts and original notes safely and securely following organisational procedures 2.6 Present texts in the required formats and within the agreed timescales

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to prepare text from shorthand. Upon completion of this unit, learners will be able to use shorthand to prepare text.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD311 Prepare text from shorthand
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	T/506/1817 Prepare text from recorded audio instruction
Level:	2
Credit Value:	4
GLH:	15
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the preparation of text from recorded notes	1.1 Explain the importance of confirming the purpose of the text and intended audience 1.2 Describe the main features of the different types of technology that can be used for playing back recordings 1.3 Explain how different speaking styles of those giving dictation can affect outputs 1.4 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to prepare text from recorded notes	2.1 Agree the purpose, format and deadlines for texts 2.2 Input and format text from audio recording 2.3 Check that text is accurate and the meaning is clear and correct 2.4 Store texts and original recordings safely and securely following organisational procedures 2.5 Present texts in the required formats and within the agreed timescales

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to prepare text from recorded audio instruction. Upon completion of this unit, learners will be able to prepare text from recorded notes.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD312 Prepare text from recorded audio instruction
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	Y/506/2295 Maintain and issue stationery and supplies
Level:	2
Credit Value:	3
GLH:	18
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the maintenance of stationery and supplies	1.1 Describe organisational policies, procedures and levels of authority in maintaining supplies 1.2 Explain how to carry out a stock check of stationery 1.3 Describe the types of problems that may occur with deliveries and stock items 1.4 Explain how to deal with problems that occur with deliveries and stock items 1.5 Explain the factors to take into account when ordering stationery 1.6 Explain the benefits and limitations of different potential suppliers, against organisational requirements 1.7 Explain how to calculate quantities of stationery and supplies to be ordered 1.8 Describe how to dispose of or recycle waste
2. Be able to maintain stocks of stationery and supplies	2.1 Maintain stocks of stationery and supplies at the required levels 2.2 Maintain the requirements of storage and security 2.3 Carry out stock checks in accordance with organisational policies and procedures 2.4 Chase up late or incorrect orders with suppliers

<p>3. Be able to issue stock of stationery and supplies</p>	<p>3.1 Issue stationery and supplies in accordance with organisational requirements</p> <p>3.2 Maintain up-to-date records of stock issued, received and in storage</p> <p>3.3 Deal with unwanted or damaged stationery and supplies safely</p> <p>3.4 Recommend ways in which the system for receiving and issuing stock could be improved</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to maintain and issue stationery and supplies. Upon completion of this unit, learners will be able to maintain and issues stocks of stationery and supplies.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAF141 Maintain and issue stock items
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	L/506/1869 Contribute to the organisation of an event
Level:	2
Credit Value:	3
GLH:	23
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event 1.2 Explain the purpose and features of different types of events 1.3 Describe the type of resources needed for different types of events 1.4 Describe the different needs attendees may have and how to meet these 1.5 Explain the requirements of health, safety and security when organising events 1.6 Describe the types of problems that may occur during events and how to deal with them
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event 2.2 Obtain resources within the agreed timescales 2.3 Distribute pre-event documentation to delegates in accordance with the event plan 2.4 Co-ordinate attendee responses within the agreed timescale 2.5 Identify any special requirements of event attendees
3. Be able to set up an event	3.1 Set up layout and resources in accordance with the event plan 3.2 Confirm that all identified resources are in place and meet requirements 3.3 Behave in a way that maintains organisational values and standards

4. Be able to carry out post-event actions	<p>4.1. Ensure the venue is restored to the required conditions in accordance with the terms of the contract</p> <p>4.2. Carry out follow-up actions in accordance with the event plan and agreements made at the event</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to contribute to the organisation of an event. Upon completion of this unit, learners will be able to carry out pre-event actions, set up an event and then carry out post-event actions.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA311 Support the organisation and co-ordination of events
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	D/506/1875 Organise business travel or accommodation
Level:	2
Credit Value:	4
GLH:	23
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the organisation of business travel or accommodation for others	1.1 Explain any budgetary or policy constraints relating to business travel or accommodation 1.2 Describe financial arrangements relating to business travel or accommodation 1.3 Explain how to make arrangements for visas and related foreign travel documentation 1.4 Describe the procedures for obtaining or exchanging foreign currency
2. Be able to research business travel or accommodation options for others	2.1 Identify different suppliers that are capable of delivering the services required within budget 2.2 Recommend travel or accommodation arrangements that best meet the requirements 2.3 Recommend suppliers of travel or accommodation that best meet the requirements
3. Be able to make business travel or accommodation arrangements for others	3.1 Confirm the requirements for travel or accommodation 3.2 Agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements 3.3 Prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately 3.4 Obtain travel or accommodation documentation within the required timescale 3.5 Confirm the acceptability of payments

	<p>to be made within the limits of their own authority</p> <p>3.6 Keep up-to-date records of travel or accommodation arrangements and agreed commitments</p> <p>3.7 Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to organise business travel or accommodation. Upon completion of this unit, learners will be able to research business travel or accommodation options for others, and then use the outcomes of that research to make business or travel arrangements for others.</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAA322 Organise business travel or accommodation
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	H/506/1876 Provide administrative support for meetings
Level:	2
Credit Value:	4
GLH:	28
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of meetings	1.1 Describe the purpose of the meeting and who needs to attend 1.2 Explain why it is important to have a minimum number of attendees for a meeting 1.3 Explain ways to achieve maximum attendance at meetings 1.4 Explain the access, health, safety and security requirements relating to meetings 1.5 Describe how to set up the resources needed for a meeting 1.6 Explain the responsibilities of the meeting chair and meeting secretary 1.7 Explain the difference between formal and informal meetings 1.8 Explain the legal implications of formal meetings
2. Be able to make administrative preparations for meetings	2.1 Book meeting venue, resources, and facilities in accordance with the brief 2.2 Collate documents needed for a meeting 2.3 Distribute meeting invitations, documents and other meeting-related requirements within the timescale 2.4 Confirm meeting attendees and any special requirements
3. Be able to support the administration of meetings	3.1 Take action to ensure that the equipment allocated for use at a meeting functions correctly 3.2 Provide support to meetings in accordance with requests 3.3 Ensure the venue is restored to the

	<p>required conditions after the meeting</p> <p>3.4 Distribute meeting records promptly to the agreed distribution list</p> <p>3.5 Carry out any follow-up actions in accordance with the brief</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to provide administrative support for meetings. Upon completion of this unit, learners will be able to make administrative preparations for meetings and also support the administration of meetings.</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA411 Support the organisation of meetings • CFABAA412 Plan and organise meetings
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	T/506/1879 Administer human resource records
Level:	2
Credit Value:	3
GLH:	28
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of human resource (HR) records	1.1 Explain what HR-related information needs to be kept and why 1.2 Explain the relationship of HR to other parts of an organisation 1.3 Describe the impact of other organisations on HR activities 1.4 Describe the features and uses of organisational systems for managing human resource information 1.5 Explain the requirements of confidentiality, data protection and system security 1.6 Describe the information to be provided for different management reports 1.7 Explain the limits of their own authority in administering HR records 1.8 Explain the implications of not keeping HR records up-to-date 1.9 Explain the actions to be taken in the event of problems arising or incomplete or inaccurate data
2. Be able to administer HR information	2.1 Keep HR records up-to-date 2.2 Process data in accordance with organisational procedures 2.3 Provide information within the limits of confidentiality 2.4 Adhere to organisational policies and procedures, legal and ethical requirements

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to administer human resource records. Upon completion of this unit, learners will be able to administer human resource (HR) information.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAB151 Administer HR records
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	A/506/1883 Administer the recruitment and selection process
Level:	2
Credit Value:	3
GLH:	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the recruitment and selection process	1.1 Explain the different administrative requirements of internal and external recruitment 1.2 Describe the uses of a job description and a person specification 1.3 Explain the administrative requirements of different methods of selection 1.4 Explain the requirements of different pre-employment checks to be carried out 1.5 Explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process 1.6 Explain the requirements of confidentiality, data protection and system security
2. Be able to administer the recruitment process	2.1 Check that the job or role details are correct and are in accordance with the brief 2.2 Place job advertisements in the agreed media in accordance with the timescales 2.3 Record applicant responses within the timescale 2.4 Provide requested information to applicants in accordance with organisational policies and procedures 2.5 Adhere to organisational policies and procedures, legal and ethical

	requirements
3. Be able to administer the selection process	3.1 Invite shortlisted applicants to participate in the selection process in accordance with organisational procedures 3.2 Co-ordinate selection arrangements in accordance with the brief 3.3 Carry out agreed pre-employment checks within the agreed timescale 3.4 Inform applicants of the outcome of their application in accordance with organisational policies and procedures 3.5 Keep selection records up-to-date
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to administer the recruitment and selection process. Upon completion of this unit, learners will be able to administer the recruitment and selection process.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • BAB152 Administer the recruitment and selection process
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	R/506/1887 Administer parking dispensations
Level:	2
Credit Value:	3
GLH:	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the administration of parking dispensations	1.1 Explain the scope and limits of their own responsibilities and authority in issuing parking dispensations 1.2 Describe the legal and regulatory requirements relating to parking dispensations 1.3 Describe the parking dispensation eligibility criteria and checks 1.4 Describe organisational security and anti-fraud policies, procedures and processes 1.5 Describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges 1.6 Explain where to go for help when dealing with parking dispensations
2. Be able to process applications for parking dispensations	2.1 Advise customers of the eligibility criteria for parking dispensations 2.2 Determine whether customers are eligible by matching the case to the criteria 2.3 Clarify any areas of doubt or confusion with customers 2.4 Carry out relevant checks in accordance with organisational procedures and legislative procedures 2.5 Record the reasons for the decision as to whether or not to grant parking dispensations 2.6 Maintain the requirements of confidentiality and data protection

<p>3. Be able to issue parking dispensations</p>	<p>3.1 Communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures</p> <p>3.2 Process payments and refunds in accordance with organisational procedures</p> <p>3.3 Keep records up-to-date</p> <p>3.4 Adhere to organisational policies and procedures, legal and ethical requirements</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to administer parking dispensations. Upon completion of this unit, learners will be able to process applications for parking dispensations and issue parking dispensations.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFASPA1 Administer parking permits, suspensions and dispensations
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	R/506/1890 Administer finance
Level:	2
Credit Value:	4
GLH:	21
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand finance for administrators	1.1 Describe organisational hierarchy and levels of authority for financial transactions 1.2 Explain organisational systems for sales invoicing, purchasing, payments and receipts 1.3 Describe the use of a purchase order, invoice, receipts and expenses
2. Be able to administer finance	2.1 Record income and expenditure in accordance with organisational policies and procedures 2.2 Process purchase orders, invoices or expenses in accordance with organisational policies and procedures 2.3 Process outgoing payments to the correct recipient 2.4 Accept or allocate incoming payments in accordance with organisational policies
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to administer finance. Upon completion of this unit, learners will understand finance for administrators and will be able to administer finance.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
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Title:	M/506/1895 Buddy a colleague to develop their skills
Level:	2
Credit Value:	3
GLH:	19
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to buddy a colleague	1.1 Describe what is expected of a buddy 1.2 Explain techniques to give positive feedback and constructive criticism 1.3 Explain techniques to establish rapport with a buddy
2. Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3 Agree a schedule of meetings that minimise disruption to business 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3. Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities 3.2 Provide examples of how to carry out tasks correctly 3.3 Identify instances of good practice and areas for improvement through observation 3.4 Praise a buddy colleague on well completed tasks 3.5 Give constructive feedback on ways in which a buddy could improve performance

	3.6 Offer a buddy hints and tips based on personal experience
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to buddy a colleague to develop their skills. Upon completion of this unit, learners will be able to develop a plan to buddy a colleague and then put that plan into action by supporting a buddy colleague in carrying out work activities.
Details of the relationship of the unit and relevant national occupational standards	Customer Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSD5249 Buddy a colleague to develop their customer service skills
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	L/506/1905 Employee rights and responsibilities
Level:	2
Credit Value:	2
GLH:	16
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry 1.2 Describe career pathways within their organisation and industry 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway 1.4 Describe an organisation's principles of conduct and codes of practice 1.5 Explain issues of public concern that affect an organisation and industry 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour 2.3 Describe the procedures and documentation that protect relationships with employees 2.4 Identify sources of information and advice on employment rights and responsibilities

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. Upon completion of this unit, learners will have developed an understanding of the role of organisations and industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.
Details of the relationship of the unit and relevant national occupational standards	N/A
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	R/506/1954 Support environmental sustainability in a business environment
Level:	4
Credit Value:	4
GLH:	38
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles supporting environmental sustainability in a business environment	1.1 Describe current legislation in relation to environmental sustainability in a business environment 1.2 Explain government incentives that support environmental sustainability in a business environment 1.3 Analyse the relationship between environmental sustainability and corporate social responsibility 1.4 Explain the health and safety considerations for environmental sustainability and waste management 1.5 Explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures
2. Be able to implement best practice in environmental sustainability in a business environment	2.1 Identify the environmental standards that are relevant to an organisation 2.2 Evaluate the impact of an organisation's business on its environment 2.3 Promote a culture of efficient consumption of energy in line with an organisation's energy management policies 2.4 Establish procedures to minimise waste and maximise the recycling of materials 2.5 Establish procedures to meet hazardous waste regulations

	2.6 Adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to support environmental sustainability in a business environment and introduces learners to the principles supporting environmental sustainability in a business environment. Upon completion of this unit, learners will be able to implement best practice in environmental sustainability in a business environment.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	D/506/1956 Resolve administrative problems
Level:	4
Credit Value:	6
GLH:	56
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles underpinning the resolution of administrative problems	1.1 Evaluate the effectiveness of different types of information on an administrative function 1.2 Explain the basis for selecting tools, techniques and strategies to analyse administrative functions 1.3 Explain the constraints attached to the use of resources needed to resolve administrative problems 1.4 Explain how to apply risk assessment and management techniques to identify and resolve administrative problems 1.5 Analyse the effectiveness of different techniques used to resolve administrative problems
2. Be able to identify administrative problems	2.1 Collect information relevant to the administrative problem 2.2 Use analytical techniques that are appropriate to the administrative problem 2.3 Clarify whether an administrative problem is recurrent, intermittent or a sole instance 2.4 Identify patterns of issues and problems 2.5 Identify the likely cause of an administrative problem

<p>3. Be able to resolve administrative problems</p>	<p>3.1 Select a strategy that is appropriate for the nature, scale, seriousness and priority of the administrative problem</p> <p>3.2 Develop a plan that addresses the administrative problem whilst minimising disruption to business</p> <p>3.3 Identify success criteria that are capable of measuring the effectiveness of solutions to solve administrative problems</p> <p>3.4 Implement a problem-solving plan within the agreed timescale and constraints</p> <p>3.5 Take action to ensure that systems and processes are capable of preventing future reoccurrences</p> <p>3.6 Evaluate the effectiveness of problem solving activities</p> <p>3.7 Adhere to organisational policies and procedures, legal and ethical requirements when resolving administrative problems</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to resolve administrative problems and introduces learners to the principles underpinning the resolution of administrative problems. Upon completion of this unit, learners will be able to identify and resolve administrative problems.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAG126 Plan how to solve business problems • CFABAG127 Solve business problems

Title:	H/506/1957 Prepare specifications for contracts
Level:	4
Credit Value:	4
GLH:	23
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles supporting the preparation of specifications for contracts	1.1 Explain the scope of contract specifications 1.2 Explain the roles and interests of those who should be involved in a tender process 1.3 Analyse the legal implications of a range of types of contracts and agreements 1.4 Explain the requirements of confidentiality and data protection 1.5 Evaluate the risks associated with procurement and tendering processes 1.6 Explain the basis for the design of a tender evaluation process
2. Be able to prepare specifications for contracts	2.1 Confirm the requirements for the contract specification 2.2 Draft contract specifications that meet the requirements including post-contractual requirements 2.3 Specify the parameters of the contract in line with the requirements 2.4 Provide sufficient information to enable potential suppliers to develop proposals that are capable of meeting the specification 2.5 Define objective selection criteria to evaluate tender proposals 2.6 Establish a selection process that meets organisational requirements 2.7 Adhere to organisational policies and procedures, legal and ethical

	requirements when preparing specifications for contracts
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to prepare specifications for contracts and introduces learners to the principles supporting the preparation of specifications for contracts. Upon completion of this unit, learners will be able to prepare specifications for contracts.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAF132 Prepare specifications for contracts

Title:	K/506/1815 Prepare text from notes using touch typing
Level:	2
Credit Value:	4
GLH:	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to create text from notes	1.1 Explain the importance of confirming the purpose of the text and intended audience 1.2 Describe the problems that may occur in transcribing notes written by others 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.4 Explain how technology features can help to create, format and check the accuracy of text 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to produce text using touch typing	2.1 Agree the purpose, format and deadlines for texts 2.2 Touch type texts at the speed and level of accuracy required by the organisation 2.3 Check that the text is accurate and the meaning is clear and correct 2.4 Store texts and original notes safely and securely following organisational procedures 2.5 Present texts in the required formats and within the agreed timescales
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to prepare text from notes using touch typing. Upon completion of this unit, learners will be able to produce text using touch typing.
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: CFABAA213a-c Prepare text from notes using touch typing
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	T/506/1820 Promote equality, diversity and inclusion in the workplace
Level:	3
Credit Value:	3
GLH:	15
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1 Explain the difference between equality, diversity and inclusion 1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy 1.3 Explain the potential consequences of breaches of equality legislation 1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1 Explain the different forms of discrimination and harassment 2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace 2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
3. Be able to support equality, diversity and inclusion in the workplace	3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace 3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace 3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting

	equality, diversity and inclusion in the workplace
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to promote equality, diversity and inclusion in the workplace. Upon completion of this unit, learners will have developed an understanding of both the organisational and personal aspects of equality, diversity and inclusion in the workplace. Learners will utilise this knowledge in supporting equality, diversity and inclusion in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBA7 Promote equality of opportunity, diversity and inclusion

Title:	A/506/1821 Manage team performance
Level:	3
Credit Value:	4
GLH:	21
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance 1.2 Explain a range of quality management techniques to manage team performance 1.3 Describe constraints on the ability to amend priorities and plans
2. Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members 2.2 Allocate work on the basis of the strengths, competences and expertise of team members 2.3 Identify areas for improvement in team members' performance outputs and standards 2.4 Amend priorities and plans to take account of changing circumstances 2.5 Recommend changes to systems and processes to improve the quality of work
3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels 3.2 Communicate individual and team objectives, responsibilities and priorities 3.3 Use communication methods that are appropriate to the topics, audience and timescales 3.4 Provide support to team members when they need it

	<p>3.5 Agree with team members a process for providing feedback on work progress and any issues arising</p> <p>3.6 Review the effectiveness of team communications and make improvements</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage the performance of a team. Upon completion of this unit, learners will have developed an understanding of the management of team performance. Learners will be able to allocate and assure the quality of work and manage communications within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDB2 Allocate work to team members • CFAM&LDB3 Quality assure work in your team

Title:	J/506/1921 Manage individuals' performance
Level:	3
Credit Value:	4
GLH:	20
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance 1.2 Explain how to identify causes of underperformance 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively 1.4 Explain how to address issues that hamper individuals' performance 1.5 Explain how to agree a course of action to address underperformance
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs 2.3 Apply motivation techniques to maintain morale 2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards

	<p>2.5 Monitor individuals' progress towards objectives in accordance with agreed plans</p> <p>2.6 Recognise individuals' achievement of targets and quality standards</p> <p>2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage individuals' performance. Upon completion of this unit, learners will have developed an understanding of the management of underperformance in the workplace and will be able to manage individuals' performance in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDB4 Manage people's performance at work • CFAM&LDC2 Support individuals' learning and development • CFAM&LDC3 Mentor individuals • CFAM&LDC5 Help individuals address problems affecting their performance

Title:	L/506/1922 Manage individuals' development in the workplace
Level:	3
Credit Value:	3
GLH:	10
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to carry out performance appraisals	1.1 Explain the purpose of performance reviews and appraisals 1.2 Explain techniques to prepare for and carry out appraisals 1.3 Provide a private environment in which to carry out appraisals 1.4 Carry out performance reviews and appraisals in accordance with organisational policies and procedures 1.5 Provide clear, specific and evidence-based feedback sensitively 1.6 Agree future actions that are consistent with appraisal findings and identified development needs
2. Be able to support the learning and development of individual team members	2.1 Describe training techniques that can be applied in the workplace 2.2 Analyse the advantages and disadvantages of learning and development interventions and methods 2.3 Explain organisational learning and development policies and resource availability 2.4 Review individuals' learning and development needs at regular intervals 2.5 Suggest learning and development opportunities and interventions that

	are likely to meet individual and business needs
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage individuals' development in the workplace. Upon completion of this unit, learners will be able to carry out performance appraisals and support the learning and development of individual team members.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDC1 Identify individuals' learning needs and styles • CFAM&LDC2 Support individuals' learning and development

Title:	Y/506/1924 Chair and lead meetings
Level:	3
Credit Value:	3
GLH:	10
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to prepare to lead meetings	1.1 Identify the type, purpose, objectives, and background to a meeting 1.2 Identify those individuals expected, and those required to attend a meeting 1.3 Prepare for any formal procedures that apply to a meeting 1.4 Describe ways of minimising likely problems in a meeting 1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale
2. Be able to chair and lead meetings	2.1 Follow business conventions in the conduct of a meeting 2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved 2.3 Manage the agenda within the timescale of the meeting 2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements
3. Be able to deal with post-meeting matters	3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale 3.2 Take action to ensure that post-meeting actions are completed

	3.3 Evaluate the effectiveness of a meeting and identify points for future improvement
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to chair and lead meetings. Upon completion of this unit, learners will be able to prepare to lead meetings, chair and lead meetings and deal with post-meeting matters.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LDD6 Lead meetings to achieve objectives

Title:	J/506/2292 Encourage innovation
Level:	3
Credit Value:	4
GLH:	14
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to identify opportunities for innovation	1.1 Analyse the advantages and disadvantages of techniques used to generate ideas 1.2 Explain how innovation benefits an organisation 1.3 Explain the constraints on their own ability to make changes 1.4 Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement 1.5 Engage team members in finding opportunities to innovate and suggest improvements 1.6 Monitor performance, products and/or services and developments in areas that may benefit from innovation 1.7 Analyse valid information to identify opportunities for innovation and improvement
2. Be able to generate and test ideas for innovation and improvement	2.1 Generate ideas for innovation or improvement that meet the agreed criteria 2.2 Test selected ideas that meet viability criteria 2.3 Evaluate the fitness for purpose and value of the selected ideas 2.4 Assess potential innovations and improvements against the agreed evaluation criteria
3. Be able to implement innovative ideas and improvements	3.1 Explain the risks of implementing innovative ideas and improvements

	<p>3.2 Justify conclusions of efficiency and value with evidence</p> <p>3.3 Prepare costings and schedules of work that will enable efficient implementation</p> <p>3.4 Design processes that support efficient implementation</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to encourage innovation. Upon completion of this unit, learners will be able to identify opportunities for innovation and generate and test ideas for innovation and improvement. Learners will also be able to implement innovative ideas and improvements.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LCA1 Identify and evaluate opportunities for innovation and improvement

Title:	M/506/1928 Procure products and/or services
Level:	3
Credit Value:	5
GLH:	35
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to identify procurement requirements	1.1 Explain current and likely future procurement requirements 1.2 Decide whether the purchase of products and/or services offers the organisation best value 1.3 Evaluate ethical and sustainability considerations relating to procurement 1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits
2. Be able to select suppliers	2.1 Explain the factors to be taken into account in selecting suppliers 2.2 Explain organisational procurement policies, procedures and standards 2.3 Explain the effect of supplier choice on the supply chain 2.4 Use appropriate media to publicise procurement requirements 2.5 Confirm the capability and track record of suppliers and their products and/or services 2.6 Select suppliers that meet the procurement specification
3. Be able to buy products and/or services	3.1 Explain the action to be taken in the event of problems arising 3.2 Agree contract terms that are mutually acceptable within their own scope of authority

	<p>3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements</p> <p>3.4 Adhere to organisational policies and procedures, legal and ethical requirements</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to procure products and/or services. Upon completion of this unit, learners will be able to identify procurement requirements, select suppliers and buy products and/or services.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LED1 Decide whether to produce or buy in products and/or services • CFAM&LED2 Procure products and/or services • CFAM&LED3 Select suppliers through a tendering process

Title:	T/506/1929 Implement change
Level:	3
Credit Value:	5
GLH:	28
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of change management	1.1 Explain the importance of effective leadership when implementing change 1.2 Explain the role of internal and external stakeholders in the management of change 1.3 Evaluate the suitability of change management models for different contexts 1.4 Explain how to assess the business risks associated with change 1.5 Assess the need for contingency planning when implementing change 1.6 Assess the need for crisis management when implementing change 1.7 Explain the different types of barriers to change and how to deal with these 1.8 Explain how to evaluate change management projects
2. Be able to plan the implementation of change	2.1 Explain the need for change 2.2 Explain the potential consequences of not implementing change 2.3 Explain the roles and responsibilities of a change management project team 2.4 Develop a plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and

	<p>resources</p> <p>Brief team members on their roles and responsibilities and the objectives of the change</p> <p>2.5 Gain acceptance to the need for change from team members and other stakeholders</p>
3. Be able to manage the implementation of a change plan	<p>3.1 Explain organisational escalation processes for reporting problems</p> <p>3.2 Analyse the advantages and disadvantages of monitoring techniques</p> <p>3.3 Implement the plan within the agreed timescale</p> <p>3.4 Provide support to team members and other stakeholders according to identified needs</p> <p>3.5 Monitor the progress of the implementation against the plan</p> <p>3.6 Manage problems in accordance with contingency plans</p>
4. Be able to evaluate the effectiveness of the implementation of change plans	<p>4.1 Assess the suitability of techniques used to analyse the effectiveness of change</p> <p>4.2 Collate valid feedback and information from stakeholders</p> <p>4.3 Analyse feedback and information against agreed criteria</p> <p>4.4 Identify areas for future improvement</p> <p>4.5 Communicate the lessons learned with those who may benefit</p>
<p>Additional information about this unit</p> <p>N/A</p>	

Unit aim (s)	This unit aims to develop the knowledge and skills required to implement change and introduces learners to the key principles of change management. Upon completion of this unit, learners will be able to plan and manage the implementation of change. After having implemented change, learners will also be able to evaluate the effectiveness of the implementation of changed plans.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LCA2 Plan change • CFAM&LCA3 Engage people in change • CFAM&LCA4 Implement change • CFAM&LCA5 Evaluate change

Title:	K/506/1930 Implement and maintain business continuity plans and processes
Level:	3
Credit Value:	4
GLH:	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to plan for the implementation of business continuity plans and processes	1.1 Describe the components of a business continuity plan 1.2 Explain the uses of a business continuity plan 1.3 Explain the features of different business continuity planning models 1.4 Explain the potential consequences of inadequate business continuity plans and processes 1.5 Confirm the required aim, scope and objectives of business continuity plans 1.6 Engage stakeholders in developing business continuity plans and processes 1.7 Identify business-critical products and/or services and the activities and resources that support them
2. Be able to implement business continuity plans and processes	2.1 Develop a framework for business continuity management 2.2 Recommend resources that are proportionate to the potential impact of business disruption 2.3 Communicate the importance and requirements of business continuity plans and processes to stakeholders 2.4 Meet their own objectives within the plan
3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes	3.1 Provide training for staff who may be affected

	<p>3.2 Validate and test the strength of business continuity plans and processes</p> <p>3.3 Update plans and processes in the light of feedback from business continuity exercises and other sources of information</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to implement and maintain business continuity plans and processes. Upon completion of this unit, learners will be able to plan and execute the implementation of business continuity plans and processes. Learners will also be able to maintain the fitness for purpose of on-going business continuity plans and process.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBB2 Develop, maintain and evaluate business continuity plans and arrangements

Title:	F/506/1934 Participate in a project
Level	3
Credit Value	3
GLH:	19
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to manage a project	1.1 Explain the features of a project business case 1.2 Explain the stages of a project lifecycle 1.3 Explain the roles of people involved in a project 1.4 Explain the uses of project-related information 1.5 Explain the advantages and limitations of different project monitoring techniques 1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources
2. Be able to support the delivery of a project	2.1 Fulfil their role in accordance with a project plan 2.2 Collect project-related information in accordance with project plans 2.3 Use appropriate tools to analyse project information 2.4 Report on information analysis in the agreed format and timescale 2.5 Draw issues, anomalies and potential problems to the attention of project managers 2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to participate in a project. Upon completion of this unit, learners will understand how to manage a project and will be able to support the delivery of a project.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD3

Title:	J/506/1949 Develop and maintain professional networks
Level:	4
Credit Value:	3
GLH:	15
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of effective networking	1.1 Describe the interpersonal skills needed for effective networking 1.2 Explain the basis on which to choose networks to be developed 1.3 Evaluate the role of shared agendas and conflict management in relationship-building 1.4 Evaluate the role of the internet in business networking 1.5 Assess the importance of following up leads and actions 1.6 Analyse ethical issues relating to networking activities
2. Be able to identify professional networks for development	2.1 Identify potential networks for professional development from an analysis of their benefits compared with individual needs and aspirations 2.2 Shortlist networks for development against defined criteria 2.3 Assess the benefits and limitations of joining and maintaining selected network(s)
3. Be able to maintain professional networks	3.1 Identify the potential for mutual benefit with network members 3.2 Promote their own skills, knowledge and competence to network members 3.3 Provide information, services or support to network members where the potential for mutual benefit has been identified

	<p>3.4 Establish the boundaries of confidentiality</p> <p>3.5 Agree guidelines for the exchange of information and resources</p> <p>3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs</p> <p>3.7 Make introductions to people with common or complementary interest to and within networks</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to develop and maintain professional networks and introduces learners to key principles underpinning effective networking. Upon completion of this unit, learners will be able to identify, develop, and maintain professional networks.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Management & Leadership (2012) National Occupational Standards:</p> <ul style="list-style-type: none"> CFAM&LAA3 Develop and maintain your professional networks

Title:	Y/506/1955 Develop and implement an operational plan
Level:	4
Credit Value:	5
GLH:	24
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of operational planning	1.1 Evaluate the use of risk analysis techniques in operational planning 1.2 Explain the components of an operational plan 1.3 Analyse the relationship between strategic and operational plans 1.4 Evaluate the use of planning tools and techniques in the operational planning process 1.5 Explain how to carry out a cost-benefit analysis
2. Be able to develop an operational plan	2.1 Identify specific, measurable, achievable, realistic and time-bound (SMART) objectives and key performance indicators (KPIs) 2.2 Identify evaluation mechanisms appropriate to the plan 2.3 Take action to ensure that plans are consistent with organisational strategy, objectives, values, policies and procedures 2.4 Develop proportionate and targeted plans to manage identified risks 2.5 Take action to ensure that plans complement and maximise synergy with other business areas 2.6 Adhere to organisational policies and procedures, legal and ethical requirements

3. Be able to implement an operational plan	3.1 Implement plans within agreed budgets and timescales 3.2 Communicate the requirements of the plans to those who will be affected 3.3 Revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks
4. Be able to evaluate the effectiveness of an operational plan	4.1 Conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources 4.2 Report on the effectiveness of operational plans in the appropriate format
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to develop and implement an operational plan and introduces learners to the key principles underpinning operational planning. Upon completion of this unit, learners will be able to develop, implement, and evaluate an operational plan.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBA9 Develop operational plans

Title:	K/506/1989 Manage physical resources
Level:	4
Credit Value:	4
GLH:	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to identify the need for physical resources	1.1 Identify resource requirements from analyses of organisational needs 1.2 Evaluate alternative options for obtaining physical resources 1.3 Evaluate the impact on the organisation of introducing physical resources 1.4 Identify the optimum option that meets operational requirements for physical resources
2. Be able to obtain physical resources	2.1 Develop a business case for physical resources that is supported by evidence, cost estimates, contingency arrangements and an analysis of likely benefits 2.2 Obtain authorisation and financial commitment for the required expenditure 2.3 Negotiate best value from contracts in accordance with organisational standards and procedures 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when obtaining physical resources 2.5 Check that the physical resources received match those ordered

3. Be able to manage the use of physical resources	3.1 Take action to ensure physical resources are used in accordance with manufacturers' instructions 3.2 Evaluate the efficiency of physical resources against agreed criteria 3.3 Recommend improvements to the use of physical resources and associated working practices 3.4 Analyse the benefits of effective equipment in the conservation of energy and the environment
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage physical resources. Upon completion of this unit, learners will be able to identify the need for physical resources, obtain physical resources, and manage the use of physical resources.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LEB2 Obtain physical resources • CFAM&LEB3 Manage physical resources

Title:	K/506/1992 Prepare for and support quality audits
Level:	4
Credit Value:	3
GLH:	17
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles underpinning the management of quality	1.1 Analyse the principles of quality management 1.2 Analyse the purpose and requirements of a range of quality standards 1.3 Analyse the advantages and limitations of a range of quality techniques 1.4 Assess how the management of quality contributes to the achievement of organisational objectives
2. Be able to prepare for quality audits	2.1 Establish the quality requirements applicable to the work being audited 2.2 Confirm that documentation is complete 2.3 Confirm that any previously agreed actions have been implemented 2.4 Make available information requested in advance by auditors
3. Be able to support quality audits	3.1 Provide access to information on request within scope of the audit 3.2 Agree actions and timescales with auditors that will remedy non-conformance or non-compliance 3.3 Identify instances where business processes, quality standards and/or procedures could be improved 3.4 Develop a quality improvement plan that addresses the issues raised

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to prepare for and support quality audits and introduces learners to the key principles underpinning the management of quality. Upon completion of this unit, learners will be able to prepare for and support quality audits.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LFE3 Prepare for and participate in quality audits

Title:	A/506/1995 Manage a budget
Level:	4
Credit Value:	4
GLH:	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to identify financial requirements	1.1 Explain how to calculate the estimated costs of activities, resources and overheads needed to achieve objectives 1.2 Analyse the components of a business case to meet organisational requirements 1.3 Analyse the factors to be taken into account to secure the support of stakeholders 1.4 Describe the business planning and budget-setting cycle
2. Understand how to set budgets	2.1 Explain the purposes of budget-setting 2.2 Analyse the information needed to enable realistic budgets to be set 2.3 Explain how to address contingencies 2.4 Explain organisational policies and procedures on budget-setting
3. Be able to manage a budget	3.1 Use the budget to control performance and expenditure 3.2 Identify the cause of variations from budget 3.3 Explain the actions to be taken to address variations from budget 3.4 Propose realistic revisions to budget, supporting recommendations with evidence 3.5 Provide budget-related reports and information within agreed timescales

	3.6 Explain the actions to be taken in the event of suspected instances of fraud or malpractice
4. Be able to evaluate the use of a budget	4.1 Identify successes and areas for improvement in budget management 4.2 Make recommendations to improve future budget setting and management
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage a budget. Upon completion of this unit, learners will have developed an understanding of how to identify financial requirements and be able to set and manage budgets and evaluate the use of a budget.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LEA1 Identify and justify requirements for financial resources • CFAM&LEA4 Manage budgets

Title:	R/506/1999 Manage a project
Level:	4
Credit Value:	7
GLH:	38
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of a project	1.1 Explain how to carry out a cost-benefit analysis for a project 1.2 Evaluate the use of risk analysis techniques 1.3 Evaluate project planning and management tools and techniques 1.4 Evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources 1.5 Analyse the requirements of project governance arrangements
2. Be able to plan a project	2.1 Analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work 2.2 Agree the objectives and scope of proposed projects with stakeholders 2.3 Assess the interdependencies and potential risks within a project 2.4 Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan 2.5 Develop proportionate and targeted plans to manage identified risks and contingencies 2.6 Apply project lifecycle approaches to the progress of a project

3. Be able to manage a project	3.1 Allocate resources in accordance with the project plan 3.2 Brief project team members on their roles and responsibilities 3.3 Implement plans within agreed budgets and timescales 3.4 Communicate the requirements of the plans to those who will be affected 3.5 Revise plans in the light of changing circumstances in accordance with project objectives and identified risks 3.6 Keep stakeholders up to date with developments and problems 3.7 Complete close-out actions in accordance with project plans 3.8 Adhere to organisational policies and procedures, legal and ethical requirements when managing a project
4. Be able to evaluate the effectiveness of a project	4.1 Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources 4.2 Evaluate the effectiveness of capturing and managing project-related knowledge 4.3 Report on the effectiveness of plans
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage a project. Upon completion of this unit, learners will have developed an understanding of the management of a project and will be able to plan, manage and evaluate a project.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LFA5 Manage projects

Title:	L/506/2004 Manage business risk
Level:	4
Credit Value:	6
GLH:	27
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the management of business risk	1.1 Explain what is meant by business risk 1.2 Analyse business risk identification theories and models 1.3 Explain measures and techniques to mitigate business risk 1.4 Explain their own level of authority in managing risk
2. Be able to address business risk	2.1 Monitor work in line with organisational risk procedures 2.2 Identify potential risks using agreed risk criteria 2.3 Assess identified risks, their potential consequences and the probability of them happening 2.4 Communicate to stakeholders the likelihood of the risk occurring and its potential consequences 2.5 Explain organisational business risk management policies
3. Be able to mitigate business risk	3.1 Develop risk management plans and processes that are proportionate to the risk and the available resources 3.2 Implement risk management plans in accordance with organisational requirements 3.3 Monitor on-going risk-related developments and amend plans in the light of changing circumstances

	<p>3.4 Keep stakeholders informed of any developments and their possible consequences</p> <p>3.5 Evaluate the effectiveness of actions taken, identifying possible future improvements</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage business risk. Upon completion of this unit, learners will have developed an understanding of the management of business risk, and will be able to address and mitigate business risk.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: CFAM&LBB1 Manage risks to your organisation

Title:	R/506/2909 Recruitment, selection and induction practice
Level:	4
Credit Value:	6
GLH:	33
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles and theories underpinning recruitment, selection and induction practice	1.1 Explain workforce planning techniques 1.2 Describe the information needed to identify recruitment requirements 1.3 Assess the impact of an organisation's structure and culture on its recruitment and selection policies and practices 1.4 Analyse the factors involved in establishing recruitment and selection criteria 1.5 Evaluate the suitability of different recruitment and selection methods for different roles 1.6 Analyse patterns of employment that affect the recruitment of staff 1.7 Explain the factors to be taken into account when developing job specifications, personal specifications and job advertisements 1.8 Explain the induction process 1.9 Explain the relationship between human resource processes and the induction processes

<p>2. Be able to recruit people into an organisation</p>	<p>2.1 Determine current staffing needs</p> <p>2.2 Identify current skills needs from identified staffing needs</p> <p>2.3 Identify future workforce needs</p> <p>2.4 Develop a resourcing plan that addresses identified needs within budgetary limitations</p> <p>2.5 Evaluate the cost-effectiveness of different methods of recruitment for an identified role</p> <p>2.6 Explain how recruitment policies and practices meet legal and ethical requirements</p> <p>2.7 Select the most appropriate method of recruitment for identified roles</p>
<p>3. Be able to select appropriate people for the role</p>	<p>3.1 Plan assessment processes that are valid and reliable</p> <p>3.2 Provide those involved in the selection process with sufficient information to enable them to make informed decisions</p> <p>3.3 Justify assessment decisions with evidence</p> <p>3.4 Inform applicants of the outcome of the process in line with organisational procedures</p> <p>3.5 Evaluate the effectiveness of the selection process</p> <p>3.6 Adhere to organisational policies and procedures, legal and ethical requirements when carrying out selection assessments</p>
<p>4. Be able to induct people into an organisation</p>	<p>4.1 Develop induction materials that meet operational and new starters' needs</p> <p>4.2 Explain to new starters organisational policies, procedures and structures</p> <p>4.3 Explain to new starters their role and responsibilities</p> <p>4.4 Explain to new starters their entitlements and where to go for help</p> <p>4.5 Assess new starters' training need</p>

	<p>4.6 Confirm that training is available that meets operational and new starters' needs</p> <p>4.7 Provide support that meets new starters' needs throughout the induction period</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required for recruitment, selection and induction practice. Upon completion of this unit, learners will have developed an understanding of the key principles and theories underpinning recruitment, selection and induction practice and will be able to recruit, select and induct people into an organisation.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDA1 Plan the workforce • CFAM&LDA2 Recruit, select and retain people • CFAM&LDA3 Induct individuals into their roles

Title:	L/506/2150 Organise and deliver customer service
Level:	3
Credit Value:	5
GLH:	27
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to organise customer service delivery	1.1 Explain how different methods of promoting products and/or services impact on customer service delivery 1.2 Explain who should be involved in the organisation of customer service delivery 1.3 Explain the importance of differentiating between customers' wants, needs and expectations 1.4 Explain different ways of segmenting customer groups 1.5 Explain how customer segmentation is used in organising customer service delivery 1.6 Explain how to analyse the "customer journey"
2. Be able to plan the delivery of customer service	2.1 Identify customers' needs and expectations 2.2 Map the "customer journey" 2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service 2.4 Prepare the resources needed to deliver products and/or services to different types of customers 2.5 Plan how to deal with unexpected additional workloads 2.6 Allocate priorities to address points of service failure

<p>3. Be able to deliver customer service</p>	<p>3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives</p> <p>3.2 Agree realistic and achievable actions with customers</p> <p>3.3 Identify areas for improvement in their own customer service delivery</p> <p>3.4 Adapt their own customer service delivery to meet customers' changing expectations</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to organise and deliver customer service. Upon completion of this unit, learners will be able to both plan and execute the delivery of customer service.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSB10 Organise the delivery of reliable customer service • CFACSB2 Deliver reliable customer service

Title:	R/506/2151 Resolve customers' complaints
Level:	3
Credit Value:	4
GLH:	22
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery 1.3 Explain negotiating techniques used to resolve customers' complaints 1.4 Explain conflict management techniques used in dealing with upset customers 1.5 Explain organisational procedures for dealing with customer complaints 1.6 Explain when to escalate customers' complaints 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services
2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints 2.2 Take personal responsibility for dealing with complaints 2.3 Communicate in a way that recognises customers' problems and understands their points of view 2.4 Explain the advantages and limitations of different complaint response options to customers 2.5 Explain the advantages and limitations of different complaint response options to the organisation

	<p>2.6 Keep customers informed of progress</p> <p>2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority</p> <p>2.8 Record the outcome of the handling of complaints for future reference</p> <p>2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints.</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to resolve customers' problems. Upon completion of this unit, learners will be able to deal with customers' problems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSC7 Process customer service complaints • CFACSC8 Handle referred customer complaints

Title:	T/502/4301 Using Email
Level:	3
Credit Value:	3
GLH:	20
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Use e-mail software tools and techniques to compose and send messages	1.1 Select and use software tools to compose and format e-mail messages, including attachments 1.2 Explain methods to improve message transmission 1.3 Send e-mail messages to individuals and groups 1.4 Explain why and how to stay safe and respect others when using e-mail 1.5 Use an address book to manage contact information
2. Manage use of e-mail software effectively	2.1 Develop and communicate guidelines and procedures for using e-mail effectively 2.2 Read and respond appropriately to e-mail messages and attachments 2.3 Use email software tools and techniques to automate responses 2.4 Explain why, how and when to archive messages 2.5 Organise, store and archive e-mail messages effectively 2.6 Customise e-mail software to make it easier to use 2.7 Explain how to minimise e-mail problems 2.8 Respond appropriately to email problems
Additional information	
N/A	

<p>Unit aim (s)</p>	<p>This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages.</p> <p>This unit is about the skills and knowledge to help others to make more efficient use of e-mail software tools to send, receive and store messages for complex and non-routine activities.</p> <p>E-mail tools and techniques will be defined as 'advanced' because:</p> <ul style="list-style-type: none"> > the techniques required will be multi-step and complex, and the selection process may involve research, identification and application; and > the IT tools required will be complex and at times involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying. <p>An activity will typically be 'complex and non-routine' because:</p> <ul style="list-style-type: none"> > the task is likely to require research, identification and application; > the context is likely to require research, analysis and interpretation; and > the user will take full responsibility for developing both the input and output type and structure of the information
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>See <i>IT User Assessment Strategy</i> available from www.e-skills.com</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	Y/502/4629 Word Processing Software
Level:	3
Credit Value:	6
GLH:	45
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Enter and combine text and other information accurately within word processing documents	1.1 Summarise what types of information are needed for the document and how they should be linked or integrated 1.2 Use appropriate techniques to enter text and other types of information accurately and efficiently 1.3 Create, use and modify appropriate templates for different types of documents 1.4 Explain how to combine and merge information from other software or multiple documents 1.5 Combine and merge information within a document from a range of sources 1.6 Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available 1.7 Select and use tools and techniques to work with multiple documents or users 1.8 Customise interface to meet needs
2. Create and modify appropriate layouts, structures and styles for word processing documents	2.1 Analyse and explain the requirements for structure and style 2.2 Create, use and modify columns, tables and forms to organise information 2.3 Define and modify styles for document elements

	2.4 Select and use tools and techniques to organise and structure long documents
3. Use word processing software tools and techniques to format and present documents effectively to meet requirements	3.1 Explain how the information should be formatted to aid meaning 3.2 Select and use appropriate techniques to format characters and paragraphs 3.3 Select and use appropriate page and section layouts to present and print multi-page and multi-section documents 3.4 Check documents meet needs, using IT tools and making corrections as necessary 3.5 Evaluate the quality of the documents produced to ensure they are fit for purpose 3.6 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose
Additional information N/A	
Unit aim (s)	<p>This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents. Word processing tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (e.g. improve efficiency)

	<p>or create an effect), exploring technical support, self-teaching and applying;</p> <ul style="list-style-type: none"> > the techniques required will be complex, and the process of selecting appropriate techniques may involve research, identification and application; and > the user will take full responsibility for the inputting, manipulating and outputting of the information
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	Y/502/4632 Website software
Level:	3
Credit Value:	5
GLH:	40
Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1. Create structures and styles and use them to produce websites	1.1 Determine what website content and layout will be needed for each page and for the site 1.2 Plan and create web page templates to layout content 1.3 Select and use website features and structures to enhance website navigation and functionality 1.4 Create, select and use styles to enhance website consistency and readability 1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites 1.6 Explain what access issues may need to be taken into account 1.7 Explain when and why to use different file types for saving content 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available
2. Select and use website software tools and features to develop multiple page websites with multimedia and interactive features	2.1 Prepare content for web pages so that it is ready for editing and formatting 2.2 Organise and combine information needed for web pages in line with any copyright constraints, including across different software 2.3 Select and use appropriate editing and formatting techniques to aid

	<p>meaning</p> <p>2.4 Select and use appropriate programming and development techniques to add features and enhance websites</p> <p>2.5 Select and use file formats that make information easier to download</p> <p>2.6 Check web pages meet needs, using IT tools and making corrections as necessary</p>
3. Publish and test multiple page websites with multimedia and interactive features	<p>3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned</p> <p>3.2 Identify any quality problems with websites and explain how to respond to them</p> <p>3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently</p> <p>3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose</p>
<p>Additional information</p> <p>N/A</p>	

Unit aim (s)	<p>This is the ability to use a software application designed for planning, designing and building websites.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of advanced of website software tools and techniques to develop multiple-page websites with multimedia and interactive features. Website software techniques will be described as ‘advanced’ because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex and at times involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the development techniques will be complex, and will involve research, identification and application; and > the user will take full responsibility for planning and developing the structure, inputting, manipulating, adding multimedia or interactive features, uploading and publishing the information
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>See <i>IT User Assessment Strategy</i> available from www.e-skills.com</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	J/502/4626 Spreadsheet Software
Level:	3
Credit Value:	6
GLH:	45
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Use a spreadsheet to enter, edit and organise numerical and other data	1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured 1.2 Enter and edit numerical and other data accurately 1.3 Combine and link data from different sources 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements	2.1 Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them 2.2 Select and use a wide range of appropriate functions and formulas to meet calculation requirements 2.3 Select and use a range of tools and techniques to analyse and interpret data to meet requirements 2.4 Select and use forecasting tools and techniques
3. Use tools and techniques to present, and format and publish spreadsheet information	3.1 Explain how to present and format spreadsheet information effectively to meet needs 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively 3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs

	3.4 Select and use appropriate page layout to present, print and publish spreadsheet information 3.5 Explain how to find and sort out any errors in formulas 3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary 3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets
Additional information N/A	
Unit aim (s)	<p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets.</p> <p>Spreadsheet software tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> the range of data entry, manipulation and outputting techniques will be complex and non-routine the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps) the user will take full responsibility for setting up and developing the functionality of the spreadsheet
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	T/502/4623 Presentation Software
Level:	3
Credit Value:	6
GLH:	45
Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1. Input and combine text and other information within presentation slides	1.1 Explain what types of information are required for the presentation 1.2 Enter text and other information using layouts appropriate to type of information 1.3 Insert charts and tables and link to source data 1.4 Insert images, video or sound to enhance the presentation 1.5 Identify any constraints which may affect the presentation 1.6 Organise and combine information for presentations in line with any constraints 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
2. Use presentation software tools to structure, edit and format presentations	2.1 Explain when and how to use and change slide structure and themes to enhance presentations 2.2 Create, amend and use appropriate templates and themes for slides 2.3 Explain how interactive and presentation effects can be used to aid meaning or impact 2.4 Select and use appropriate techniques to edit and format presentations to meet needs 2.5 Create and use interactive elements to enhance presentations

	2.6 Select and use animation and transition techniques appropriately to enhance presentations
3. Prepare interactive slideshow for presentation	<p>3.1 Explain how to present slides to communicate effectively for different contexts</p> <p>3.2 Prepare interactive slideshow and associated products for presentation</p> <p>3.3 Check presentation meets needs, using IT tools and making corrections as necessary</p> <p>3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them</p> <p>3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose</p>
Additional information N/A	
Unit aim (s)	<p>This is the ability to use software applications to produce effective presentations, which include a combination of media (e.g. images, animation and sound) for education, entertainment or information sharing.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine.</p> <p>Presentation tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying; the inputting, manipulating and outputting techniques will be complex,

	<p>and will involve research, identification and application; and</p> <ul style="list-style-type: none"> > the user will take full responsibility for inputting, structuring, editing and presenting the information
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	J/502/4397 Bespoke Software
Level:	3
Credit Value:	4
GLH:	30
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Input and combine information using bespoke software	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications
2. Create and modify appropriate structures to organise and retrieve information efficiently	2.1 Evaluate the use of software functions to structure, layout and style information 2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently 2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data, where available
3. Exploit the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, analyse and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs 3.4 Select and use presentation methods to aid clarity and meaning

Additional information	
N/A	
Unit aim (s)	<p>This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.</p> <p>This unit is about the skills and knowledge needed by an IT user to select and use a range of advanced of bespoke software tools and techniques for complex or non-routine information.</p> <p>Bespoke software tools and techniques at this level are defined as:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex, and at times involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and > the user will take full responsibility for inputting, manipulating and outputting the information
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

	See http://nos.e-skills.com for examples of content and context applicable to this unit
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Title:	T/502/4556 Database Software
Level:	3
Credit Value:	6
GLH:	45
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Plan, create and modify relational database tables to meet requirements	1.1 Explain how a relational database design enables data to be organised and queried 1.2 Plan and create multiple tables for data entry with appropriate fields and properties 1.3 Set up and modify relationships between database tables 1.4 Explain why and how to maintain data integrity 1.5 Respond appropriately to problems with database tables 1.6 Use database tools and techniques to ensure data integrity is maintained
2. Enter, edit and organise structured information in a database	2.1 Design and create forms to access, enter, edit and organise data in a database 2.2 Select and use appropriate tools and techniques to format data entry forms 2.3 Check data entry meets needs, using IT tools and making corrections as necessary 2.4 Respond appropriately to data entry errors
3. Use database software tools to create, edit and run data queries and produce reports	3.1 Explain how to select, generate and output information from queries according to requirements 3.2 Create and run database queries to display, amend or calculate selected data

	<p>3.3 Plan and produce database reports from a multiple-table relational database</p> <p>3.4 Select and use appropriate tools and techniques to format database reports</p> <p>3.5 Check reports meet needs, using IT tools and making corrections as necessary</p>
Additional information N/A	
Unit aim (s)	<p>This is the ability to use a software application designed to organise and store structured information and generate reports.</p> <p>This unit is about selecting and using advanced database software tools and techniques efficiently to:</p> <ul style="list-style-type: none"> > enter complex information into databases; > retrieve information by creating queries using multiple selection criteria; and > produce reports by setting up menus or short cuts <p>They will also be able to design, create and interrogate multiple-table relational databases.</p> <p>Database tools, functions and techniques will be defined as:</p> <ul style="list-style-type: none"> > the software tools and functions involved will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying; and > the input, manipulation and output techniques involved will be complex, which will involve research, identification and application

Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009) See http://nos.e-skills.com for examples of content and context applicable to this unit

Title:	F/506/2596 Principles of leadership and management
Level:	3
Credit Value:	8
GLH:	50
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of effective decision making	1.1 Explain the importance of defining the objectives, scope and success criteria of the decisions to be taken 1.2 Assess the importance of analysing the potential impact of decision making 1.3 Explain the importance of obtaining sufficient valid information to enable effective decision making 1.4 Explain the importance of aligning decisions with business objectives, values and policies 1.5 Explain how to validate information used in the decision making process 1.6 Explain how to address issues that hamper the achievement of targets and quality standards
2. Understand leadership styles and models	2.1 Explain the difference in the influence on managers and leaders on their teams 2.2 Evaluate the suitability and impact of different leadership styles in different contexts 2.3 Analyse theories and models of motivation and their application in the workplace
3. Understand the role, functions and processes of management	3.1 Analyse a manager's responsibilities for planning, coordinating and controlling work

	<p>3.2 Explain how managers ensure that team objectives are met</p> <p>3.3 Explain how a manager's role contributes to the achievement of an organisation's vision, mission and objectives</p> <p>3.4 Analyse theories and models of management</p> <p>3.5 Explain how the application of management theories guide a manager's actions</p> <p>3.6 Explain the operational constraints imposed by budgets</p>
4. Understand performance measurement	<p>4.1 Explain the relationship between business objectives and performance measures</p> <p>4.2 Explain the features of a performance measurement system</p> <p>4.3 Explain how to set key performance indicators (KPIs)</p> <p>4.4 Explain the tools, processes and timetable for monitoring and reporting on business performance</p> <p>4.5 Explain the use of management accounts and management information systems in performance management</p> <p>4.6 Explain the distinction between outcomes and outputs</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding leadership and management and introduces learners to the associated key principles. Upon completion of this unit, learners will have an understanding of the principles of effective decision making, leadership styles and models and performance management. Learners will also have an</p>

	understanding of the role, functions and processes of management.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	<p>Management & Leadership (2012) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFAM&LBA2 Provide leadership in your area of responsibility • CFAM&LDB4 Manage people's performance at work

Title:	K/502/9933 Principles of market research
Level:	3
Credit Value:	5
GLH:	40
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the basis on which market research is commissioned	1.1 Describe how to identify the need for market research and the sources of evidence to support this 1.2 Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others 1.3 Explain how to set research parameters, aims and evaluation criteria 1.4 Explain the importance of involving stakeholders in the definition of research to be carried out 1.5 Explain how to evaluate different options for conducting the research
2. Understand how to design market research projects	2.1 Explain how to set research objectives, timescales, budget and resource requirements and success criteria 2.2 Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives 2.3 Describe the factors to be taken into account when selecting research instruments that are fit for purpose 2.4 Explain how to ensure the suitability of methods chosen to conduct research

	<p>2.5 Explain the strengths and limitations of quantitative and qualitative research</p> <p>2.6 Explain how risks inherent in market research may be addressed</p> <p>2.7 Explain how to ensure that research data collected is valid and reliable</p> <p>2.8 Describe the uses of the research outputs</p> <p>2.9 Explain how to obtain approval to the proposed research</p>
3. Understand the principles of marketing data collection	<p>3.1 Explain the difference between primary and secondary research and how this affects data collection methods and interpretation</p> <p>3.2 Describe the importance of using research instruments correctly</p> <p>3.3 Explain the role of data collection in a market research project</p> <p>3.4 Explain how to address problems arising in data collection (e.g. insufficiency of representative sample, unreliable or invalid data)</p> <p>3.5 Explain the importance of accurate data collection and recording</p> <p>3.6 Explain marketing data storage, security and access requirements</p>
4. Understand the principles of marketing data interpretation and evaluation	<p>4.1. Explain the volume of data needed to ensure statistical confidence</p> <p>4.2. Explain how to evaluate the quality, reliability and validity of market research data</p> <p>4.3. Describe the use(s) of market research</p> <p>4.4. Explain the application, strengths and weaknesses of different data analysis methods</p> <p>4.5. Explain the use of statistical tools to identify trends, causes and correlations in marketing data</p> <p>4.6. Explain the strengths and weaknesses of different data evaluation methods</p>

	4.7. Explain the basis on which to reach conclusions as to the usefulness of the research
Additional information about this unit N/A	
Unit aim (s)	This unit concerns understanding the basis on which market research is commissioned, how to design market research projects, the principles of marketing data collection and the principles of marketing data interpretation and evaluation
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	This unit is linked to Council for Administration NOS; Marketing 1.2.1 Define the need for market research Marketing 1.2.2 Design market research projects Marketing 1.2.4 Collect market research data Marketing 1.2.7 Collect data on the knowledge, attitude and behaviours of target groups

Title:	T/502/9935 Principles of marketing and evaluation
Level:	3
Credit Value:	7
GLH:	50
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the principles of market segmentation	1.1 Explain the importance of defining market segments to the development and achievement of the marketing strategy 1.2 Explain the difference between market segments and customer classification 1.3 Explain how the characteristics, motivations and behaviours of potential target customers are identified 1.4 Explain how to cluster customers with similar characteristics 1.5 Describe how to confirm that proposed segments are real, distinctive, viable and their buying power measurable 1.6 Explain how to evaluate the profitability and stability of market segments 1.7 Describe how a range of products may appeal to different market segments 1.8 Explain the motivators and inhibitors that influence customer behaviour 1.9 Explain the use of Customer Relationship Management

<p>2. Understand how to assess market opportunities for new products and/or services</p>	<p>2.1 Describe the economic and buyer behavioural factors to be taken into account when assessing new market opportunities</p> <p>2.2 Describe the cultural factors that are likely to affect customers' perception of products and/or services and sales performance</p> <p>2.3 Explain how to identify opportunities and threats in new markets and for new products in existing markets</p> <p>2.4 Explain how competitor and potential competitor activity may affect projected sales performance</p> <p>2.5 Explain the basis of recommendations to exploit new market opportunities</p>
<p>3. Understand the principles of marketing strategy development</p>	<p>3.1 Describe the topics to be addressed in a marketing strategy</p> <p>3.2 Explain the use of market analyses to inform the development of a marketing strategy</p> <p>3.3 Explain how to evaluate risks to the achievement of objectives</p> <p>3.4 Describe how to forecast sales by product and/or service</p> <p>3.5 Explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts</p> <p>3.6 Explain the importance of engaging stakeholders in the development of a marketing strategy</p> <p>3.7 Explain the significance of customer loyalty to the achievement of marketing objectives and strategy</p> <p>3.8 Explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment</p>
<p>4. Understand how to evaluate the effectiveness of a marketing strategy</p>	<p>4.1. Explain the importance of conducting the evaluation in accordance with the specification</p>

	<p>4.2. Describe the factors to be taken into account in the evaluation of the effectiveness of a marketing strategy</p> <p>4.3. Explain the strengths and weaknesses of different evaluation methods</p> <p>4.4. Describe how to identify trends and themes from evaluation data</p> <p>4.5. Explain how to ensure the reliability and validity of evaluation data</p> <p>4.6. Explain how to achieve an acceptable level of statistical confidence</p> <p>4.7. Explain how to address critical issues revealed by evaluation</p> <p>4.8. Explain the importance of justifying recommendations and conclusions with evidence</p> <p>4.9. Explain the use of impact analysis in the evaluation process</p> <p>4.10. Explain the importance of marketing to the achievement of business objectives and strategies</p> <p>4.11. Describe the links between corporate social responsibility and marketing strategies</p>
Additional information about this unit N/A	
Unit aim (s)	This unit concerns understanding the principles of market segmentation, how to assess market opportunities for new products and/or services, the principles of marketing strategy development and how to evaluate the effectiveness of a marketing strategy
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

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

This unit is linked to Council for Administration NOS

Marketing 1.3.1 Evaluate and interpret findings and identify connections in complex data

Marketing 1.3.3 Establish and understand potential market segments

Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential

Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy

STC 2-1 Principles of marketing theory

Marketing 2.1.3 Demonstrate the value of marketing to the organisation

Marketing 3.1.1 Develop marketing strategies and plans for products and services

Marketing 4.2.6 Evaluate advertising

Marketing 6.2.1 Assess marketing opportunities within international and/or diverse markets

Title:	F/502/9937 Principles of digital marketing and research
Level:	3
Credit Value:	7
GLH:	50
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the role and requirements of digital marketing	1.1 Explain the role of digital marketing within the overall marketing strategy 1.2 Explain the strengths and weaknesses of digital marketing for different marketing applications 1.3 Explain the importance of targeted digital marketing 1.4 Describe the sources of data lists for use in targeting customers and potential customers 1.5 Explain the legal requirements and implications of digital marketing 1.6 Describe the design requirements of data capture and reporting systems for digital marketing 1.7 Explain the importance of evaluating the impact of digital marketing activities
2. Understand the principles of search engine optimisation (SEO)	2.1 Explain the importance of search engine optimisation 2.2 Describe how to calculate the cost-efficiency of SEO 2.3 Explain the use of Meta Tags, website codes and keywords 2.4 Explain the use of offsite SEO in optimising marketing effectiveness 2.5 Explain the design principles of response systems 2.6 Explain the advantages and disadvantages of links to other websites

<p>3. Understand the principles of marketing research using the internet</p>	<p>3.1 Explain the scope for customising search-related internet facilities to enable the identification and retrieval of targeted information</p> <p>3.2 Explain the advantages and disadvantages of different data mining techniques</p> <p>3.3 Explain how to use multiple-table relational databases</p> <p>3.4 Explain how to ensure the validity and reliability of information retrieved from the internet</p>
<p>4. Understand the principles of digital marketing device and message design</p>	<p>4.1. Explain the potential uses of a Customer Relationship Management (CRM) system</p> <p>4.2. Explain the design requirements of a CRM system</p> <p>4.3. Describe the characteristics of an effective digital marketing device</p> <p>4.4. Describe the characteristics of an effective digital response system</p> <p>4.5. Explain the requirements, advantages and disadvantages of different tracking systems</p> <p>4.6. Explain how to overcome the barriers posed by non-interoperable technologies</p>
<p>5. Understand how to use digital technology for marketing purposes</p>	<p>5.1 Explain the implications for the use of digital technology of campaigns that are aimed at retention, acquisition and conversion</p> <p>5.2 Explain methods of managing digital databases including permission marketing and the application of suppressions/opt-outs</p> <p>5.3 Explain the advantages and disadvantages of different digital technologies and combination of technologies for a range of marketing applications</p>
<p>Additional information about this unit</p> <p>N/A</p>	

Unit aim (s)	This unit concerns understanding the role and requirements of digital marketing, the principles of search engine optimisation (SEO), the principles of marketing research using the internet, the principles of digital marketing device and message design and how to use digital technology for marketing purposes
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	This unit is linked to the Council for Administration NOS Marketing 4.3.8 Market to target customers using digital/electronic media Marketing 4.3.9 Communicate using multiple digital marketing channels

Title:	J/502/9938 Principles of marketing stakeholder relationships
Level:	3
Credit Value:	3
GLH:	16
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand marketing stakeholder relationships	1.1 Explain the basis on which the need for marketing stakeholder relationships are identified and prioritised 1.2 Explain the use of stakeholder mapping in developing ways of building relationships 1.3 Describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications 1.4 Explain the significance of stakeholders to the achievement of the overall marketing strategy 1.5 Describe the features of the market in which stakeholders operate 1.6 Describe how to establish stakeholders' attitudes to an organisation 1.7 Describe actual and potential synergies and conflicts between clients and other stakeholders
2. Understand how to build and manage marketing stakeholder relationships	2.1 Explain how to identify common goals and potential synergy between stakeholders and an organisation 2.2 Explain the importance of engaging stakeholders in marketing activities 2.3 Explain the basis upon which stakeholder communications plans are developed

	<p>2.4 Explain the requirements of a competitor management strategy</p> <p>2.5 Explain the importance of agreeing common objectives with clients</p> <p>2.6 Describe the scope of generalist and specialist personnel that can be deployed in support of building long term relationships with clients</p>
3. Understand how to monitor and control marketing stakeholder relationships	<p>3.1 Explain the use of key performance indicators and success criteria in monitoring the effectiveness of stakeholder relationships</p> <p>3.2 Describe methods of monitoring the ongoing effectiveness of stakeholder relationships</p> <p>3.3 Explain the importance of effective stakeholder communications and feedback system</p> <p>3.4 Explain how changes in the market environment in which stakeholders operate may have an impact on relationships</p> <p>3.5 Explain how to develop strategies and plans that address changing stakeholder attitudes and needs</p> <p>3.6 Explain how to develop reporting systems that meet agreed success criteria</p> <p>3.7 Explain the importance of reviewing the effectiveness of collaborative arrangements with stakeholders</p>
Additional information about this unit N/A	
Unit aim (s)	This unit concerns understanding marketing stakeholder relationships, how to build and manage marketing stakeholder relationships and how to monitor and control marketing stakeholder relationships

Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 2.1.4 Identify and manage relationships with social marketing stakeholders</p> <p>Marketing 4.1.1 Develop and understanding of the client</p> <p>Marketing 4.4.3 Build and manage stakeholder relationships</p> <p>Marketing 4.4.5 Manage business and political relationships and lobby for influence</p> <p>Marketing 4.4.6 Manage financial public relations and investor relations</p> <p>Marketing 7.3.3 Develop strategic relationships with major clients</p> <p>Marketing 7.4.4 Build and sustain collaborative relationships with other organisations (MSC D17)</p> <p>Marketing 7.1.6 Monitor and control relationship management activities</p>

Title:	Y/506/2152 Understand the customer service environment
Level:	3
Credit Value:	5
GLH:	40
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the concepts and practices underpinning customer service delivery	1.1 Explain the value of customer service as a competitive tool 1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service 1.3 Describe techniques used to identify service failures 1.4 Explain the concept and importance of the service profit chain 1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to customers and to an organisation 2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services 2.3 Explain the potential impact of good and poor customer service on a brand
3. Understand the structure of customer service	3.1 Explain the features of different customer service models and customer service standards 3.2 Explain the relationship between customer service and operational areas of an organisation

	<p>3.3 Explain the relationship between customer service and continuous improvement processes</p> <p>3.4 Explain the costs and benefits of customer service to an organisation</p> <p>3.5 Explain the impact of organisational values on how customers create their expectations</p> <p>3.6 Explain how organisational values impact on meeting customer expectations</p>
4. Understand the implications of legislation on customer service delivery	<p>4.1 Explain the implications of consumer-related legislation on customer service delivery</p> <p>4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding the customer service environment. Upon completion of this unit, learners will have developed an understanding of the structure of customer service and the key concepts and practices that underpin customer service delivery. Learners will be aware of the relationship between customer service and a brand and will understand the implications of legislation on customer service delivery.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	<p>Customers Service (2013) National Occupational Standards</p>

Title:	D/506/1939 Understand the legal context of business
Level:	3
Credit Value:	6
GLH:	44
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the legal framework within which businesses operate	1.1 Explain the legal requirements of different types of business 1.2 Describe the roles and powers of government departments and agencies in regulating business 1.3 Explain the legal provisions relating to intellectual property
2. Understand the principles of business governance	2.1 Explain the corporate governance statutory framework of a business 2.2 Explain the roles and responsibilities of an organisation's governing body 2.3 Explain the financial reporting requirements of an organisation
3. Understand how contract law affects a business	3.1 Explain the elements of a valid business contract 3.2 Analyse different types of contracts 3.3 Explain the difference between negligence and liability 3.4 Explain the liabilities and entitlements of sellers and purchasers of goods and services
4. Understand the requirements of employment law	4.1 Describe the sources, institutions and enforcement systems for individual employment rights 4.2 Explain the features of types of worker and employment contracts for service 4.3 Explain the implications of contracts of service and contracts for service

	<p>4.4 Explain the implications of different types of employment status</p> <p>4.5 Explain the requirements for an organisation for health and safety</p> <p>4.6 Explain the requirements for an organisation for equality and diversity</p> <p>4.7 Explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy</p> <p>4.8 Describe the impact of human rights legislation on the employment relationship</p>
Additional information about this unit N/A	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding the legal context of business. Upon completion of this unit, learners will have developed an understanding of the legal framework within which businesses operate. Learners will also have an awareness of the key principles of business governance, the impact of contract law on business, and the requirements of employment law.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	R/503/9324 Principles of Social Media within a Business
Level:	3
Credit Value:	6
GLH:	42
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how Social Media fits into the objectives and marketing of a business	1.1 Describe a business and its type, vision, aims, objectives and goals 1.2 Identify the brand and values of a business and how these are portrayed to the audience of a business 1.3 Describe the marketing tools available to a business 1.4 Explain the consequences of using Social Media on the budget of different sizes and types of business 1.5 Explain the benefits and consequences of encouraging amplification 1.6 Explain the benefits and consequences of encouraging engagement 1.7 Explain the factors to consider when identifying a Social Media plan for a business 1.8 Explain how Social Media could fit into the marketing plan of a business
2. Understand how to select Social Media tools and channels for a business	2.1 Describe the different tools and channels that can be used for Social Media 2.2 Describe the features and benefits of the different tools and channels that can be used for Social Media 2.3 Identify the potential type of audience for each different tool and channel that can be used for Social Media

	<p>2.4 Explain the factors to consider when selecting different tools and channels for Social Media</p> <p>2.5 Evaluate different tools and channels for Social Media for business use</p>
3. Understand how to measure the success of using social media tools and channels	<p>3.1 Explain the importance of measuring the outcomes of using different Social Media tools and channels</p> <p>3.2 Explain why SMARTER targets should be set for different Social Media tools and channels</p> <p>3.3 Describe the methods a business can use to measure and identify success of different Social Media tools and channels</p> <p>3.4 Describe what success could look like when using different Social Media tools and channels for different types and sizes of business</p>
4. Understand how social media policy and guidelines can impact a business	<p>4.1 Describe the components of a business's social media policy and guidelines</p> <p>4.2 Explain the importance of having a social media policy and guidelines</p> <p>4.3 Explain the importance of having a reputation management policy</p> <p>4.4 Describe the benefits of managing perception changes in a business's reputation</p> <p>4.5 Describe how to manage perception changes in a business's reputation</p>
5. Be able to monitor how a business is using Social Media	<p>5.1 Explain the importance of knowing how similar businesses or industries are using Social Media</p> <p>5.2 Explain how to monitor the ways similar businesses or industries are using Social Media</p> <p>5.3 Monitor how a business is using Social Media</p> <p>5.4 Identify improvements to a business's use of Social Media</p>
<p>Additional information about this unit</p> <p>N/A</p>	

Unit aim (s)	This unit is about the fundamentals of social media marketing for a business.
Assessment requirements specified by a sector or regulatory body (if appropriate)	This unit is endorsed by CfA, the Council for Administration, and e-skills UK, the Sector Skills Council for Business and Information Technology.
Details of the relationship of the unit and relevant national occupational standards	N/A