

City & Guilds Level 3 NVQ Certificate/Diploma in Business and Administration (4428-03/93)



Qualification handbook for centres

www.cityandguilds.com
June 2020
Version 2.4 (March 2023)

City & Guilds Level 3 NVQ Certificate in Business and
Administration

500/9626/6

City & Guilds Level 3 NVQ Diploma in Business and
Administration

500/9548/1

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Version and date	Change detail	Section
1.4 Nov 2012	Additional units added to rules of combination	Qualification Structure (Page 8)
1.5 July 2013	Specified 'C' into the statement 'a maximum of 13 credits are allowed from optional units in Group (this is not compulsory).'	Qualification Structure (Page 8)
1.6 December 2015	Last registration and last certification dates removed	Introduction to the qualifications (Page 7)
V2 June 2020	Added section 'Total Qualification Time'	Qualification Structure (Page 12)
V2.1 June 2021	Unit 231 'Administer the recruitment and selection process', renumbered Outcome 3 assessment criteria; Unit 225 outcome 3, amended numbering of assessment criteria as 3.4 was repeated.	Page 105, Page 86
V2.2 March 2022	GLH and TQT clarified and highlighted	Throughout
V2.3 Nov. 2022	Certificate GLH updated	Qualification structure
V2.4 Mar 2023	Formatting errors amended	Throughout

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1 Introduction to the qualifications

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

Qualification title and level	City & Guilds qualification number	Qualification accreditation number
Level 3 NVQ Certificate in Business and Administration	4428-93	500/9626/6
Level 3 NVQ Diploma in Business and Administration	4428-03 / 93	500/9548/1

The City & Guilds Level 3 NVQ Certificate and Diploma in Business and Administration meet the needs of candidates already employed in or who wish to work in an administrative role with a high degree of autonomy. They provide the candidate with the opportunity to develop their understanding of and skills in a broad range of administrative activities such as information management, event co-ordination and implementing procedures and systems. With their flexible structures and diverse set of optional units these NVQs will enable the candidate to gain essential business skills such as decision-making and resource and project management thus meeting the needs of employers from all types of organisations and industries.

These competence based qualifications replace the City & Guilds 4404 Level 3 NVQ in Business and Administration which expired on 31 July 2010. These qualifications are based on national occupational standards developed by the Council for Administration (CfA) and were designed in collaboration with City & Guilds and other awarding organisations. They include imported units from e-Skills, the Institute of Customer Service (ICS) and the Management Standards Centre.

Units achieved within the Level 3 NVQ Certificate can contribute towards the Level 3 NVQ Diploma which is a component of the Advanced Apprenticeship in Business and Administration framework. Optional units within these qualifications also form part of the Level 4 NVQ Certificate and Diploma so facilitating progression onto further learning and training.

Contacting the Sector Skills Councils/Standards Setting Bodies

CfA

Tel: 0207 091 9620

Fax: 0207 091 7340

Email: info@cfa.uk.com

Website: www.cfa.uk.com

e-skills UK

Tel: 0207 963 8920

Fax: 0207 592 9138

Email: info@e-skills.com

Website: www.e-skills.com

ICS

Tel: 01206 571716

Fax: 01206 54668

Email: enquiries@icsmail.co.uk

Website: www.instituteofcustomerservice.com

Management Standards Centre

Tel: 0207 240 2725

Email: management.standards@managers.org.uk

Website: www.management-standards.org

1.1 Qualification structure

Level 3 NVQ Certificate in Business and Administration

To achieve the Level 3 NVQ Certificate in Business and Administration the learner must achieve

- a minimum of 30 credits overall, of which a minimum of 20 credits must be at level 3
- 13 credits from the four mandatory units in Group A
- a minimum of 11 credits from optional units in Group B
- a maximum of 6 credits are allowed from optional units in Group C (this is not compulsory).

Level 3 NVQ Diploma in Business and Administration

To achieve the Level 3 NVQ Diploma in Business and Administration the learner must achieve

- a minimum of 40 credits overall, of which a minimum of 27 credits must be at level 3
- 13 credits from the four mandatory units in Group A
- a minimum of 14 credits from optional units in Group B
- a maximum of 13 credits are allowed from optional units in Group C (this is not compulsory).

Key to table

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

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

Total Qualification Time

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

TQT is comprised of the following two elements:

- 1) The number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and

An estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by - but, unlike Guided Learning, not under the Immediate Guidance or Supervision of - a lecturer, supervisor, tutor or other, appropriate provider of education or training

Title and level	GLH	TQT
Level 3 NVQ Certificate in Business and Administration	146	300
Level 3 NVQ Diploma in Business and Administration	167	400

1.2 Opportunities for progression

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

- Level 3 Advanced Apprenticeship in Business and Administration (9050)
- Level 4 NVQ Certificate/Diploma in Business and Administration (4428-04/94)
- Level 4 NVQ Diploma in Customer Service (4430)
- Leadership and management qualifications offered by our sister organisation ILM www.i-l-m.com

1.3 Qualification support materials

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

Description	How to access
Promotional materials	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

2 Centre requirements

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

Centres already offering City & Guilds qualifications in this subject area

Centres currently approved to offer the 4404 Level 3 NVQ in Business and Administration will be given automatic approval for the new Level 3 NVQ Certificate/Diploma in Business and Administration. Existing sanctions will also apply to the new qualifications.

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

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

Centres not yet approved by City & Guilds

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

2.1 Resource requirements

Human resources

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

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

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

www.e-skills.com

www.instituteofcustomerservice.com (now under the CfA)

www.management-standards.org (now under the CfA)

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

Assessors and internal verifiers

- a) Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications
- or
- b) A trainer, supervisor or manager, employed by an organisation must either:

1. hold or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications
or
2. seek guidance and approval from City & Guilds to demonstrate that the
 - organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
 - trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

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

Continuing professional development (CPD)

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

2.2 Candidate entry requirements

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

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

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

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

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

Realistic work environments

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

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

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

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

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

Simulation

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

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

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

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

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

Age restrictions

These qualifications are not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group.

3 Course design and delivery

3.1 Initial assessment and induction

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

The initial assessment should identify:

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

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

3.2 Recommended delivery strategies

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

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

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

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

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

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

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

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

4 Assessment

4.1 Summary of assessment methods

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

- a portfolio of evidence
- for imported ITQ units the City & Guilds 7574/7266 assignments are an acceptable alternative method of assessment.

City & Guilds provides the following assessments:

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

Time constraints

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

- Assessment must be completed within the candidate's period of registration.
- Indicated time allowances must be followed if using the 7574/7266 assignments to assess the imported ITQ units.

4.2 Evidence requirements

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

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

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

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

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

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

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

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

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

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

Professional discussion: Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.

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

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

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

Case studies: An effective case study report should:

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

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

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

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

Characteristics of assessment guidance

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

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

able to competently meet the functional requirements of a Business and Administration QCF NVQ unit.

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

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

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

- current
- sufficient
- relevant
- appropriate
- authentic
- fair.

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

Holistic Assessment

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

Using a holistic approach to assessment will:

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

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

Using other related qualifications as evidence

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

4.3 Recording forms

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

City & Guilds endorses several ePortfolio systems. Further details are available at:
www.cityandguilds.com/eportfolios.

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

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

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

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

4.4 Recognition of prior learning/achievement (RPL/A)

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

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

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

5 Units

Availability of units

The Business and Administration units for these qualifications follow.

Imported units from IT, Customer Service and Management are available in the **4428 Imported Units** document.

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

Structure of units

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

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

Unit 112

Use occupational health and safety guidelines when using keyboards

Level: 1

Credit value: 2

NDAQ number: T/601/2465

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAE141.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance**Assessment Criteria**

The learner can:

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

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

The learner can:

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

Evidence requirements

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

Unit 207

Use electronic message systems

Level: 2

Credit value: 1

NDAQ number: H/601/2476

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 6 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAA622.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the use of electronic message systems

Assessment Criteria

The learner can:

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

Outcome 2: Be able to use electronic message systems

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role
	2.5 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • messages

Unit 208

Use a diary system

Level: 2

Credit value: 3

NDAQ number: K/601/2477

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 9 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAA431.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand a diary system

Assessment Criteria

The learner can:

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

Outcome 2: Understand how to use a diary system

Assessment Criteria

The learner can:

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

Outcome 3: Be able to use a diary system

Assessment Criteria

The learner can:

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

Evidence requirements

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

Unit 209

Take minutes

Level: 2

Credit value: 4

NDAQ number: M/601/2478

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA441.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the task of taking minutes at meetings

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 3: Know how to take minutes at meetings

Assessment Criteria

The learner can:

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

Outcome 4: Be able to prepare for taking minutes

Assessment Criteria

The learner can:

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

Outcome 5: Be able to minute meetings

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.2	
3.	3.1 – 3.9	
4.	4.1	
	4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	4.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • agenda

5.	5.1 – 5.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • notes of meeting • minutes of meeting
	5.4 – 5.7	<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • minutes of meetings
5.8 5.10		<p>Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes
5.9		<p>Evidence may be supplied via witness testimony and candidate reports/reflective accounts</p>

Unit 210 Handle mail

Level: 2
Credit value: 3
NDAQ number: T/601/2479

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 17 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAA612.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand security procedures when handling mail or packages

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.6	
3.	3.1 – 3.3 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • mail records • log book – special deliveries
	3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role
4.	4.1 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • mail records • log book – special deliveries
5.	5.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role

5.2

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

- mail records
- log book – special deliveries

Unit 211

Provide reception services

Level: 2

Credit value: 3

NDAQ number: K/601/2480

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAC312.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose of reception services in a business environment

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 4: Provide a reception service

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.9	
3.	3.1 – 3.2	
4.	4.1 – 4.5 4.7 4.9 – 4.10	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	4.6 4.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Unit 212

Produce documents in a business environment

Level: 2

Credit value: 4

NDAQ number: T/601/2482

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA211.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose of producing high quality and attractive documents in a business environment

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 4: Be able to prepare for tasks

Assessment Criteria

The learner can:

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

Outcome 5: Be able to produce documents to agreed specifications

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.7	
4.	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
5.	5.1 – 5.3 5.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

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- 5.4 – 5.7
5.9 – 5.10
- Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- documents produced

Unit 213

Prepare text from notes

Level: 2

Credit value: 3

NDAQ number: A/601/2483

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA213.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand preparing text from notes**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

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

The learner can:

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

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.6	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
4.	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos

Unit 214 Prepare text from notes using touch typing (40 wpm)

Level: 2
Credit value: 3
NDAQ number: F/601/2484

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA215.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Unit 214

Prepare text from notes using touch typing (40 wpm)

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 3: Be able to prepare for tasks

Assessment Criteria

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

Outcome 4: Be able to produce texts using touch typing

Assessment Criteria

The learner can:

- 4.1 Input texts using touch typing to a minimum speed of 40 words per minute

- 4.2 Format texts to agreed style and layout making efficient use of available technology
- 4.3 Clarify text requirements when necessary
- 4.4 Read and check texts for accuracy
- 4.5 Edit and correct texts, as required
- 4.6 Store texts and original notes safely and securely following organisational procedures
- 4.7 Present texts to the required format, within the agreed deadlines

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.6	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
4.	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos

Unit 215

Prepare text from shorthand (60 wpm)

Level: 2

Credit value: 8

NDAQ number: J/601/2485

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 55 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAD311.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the task of preparing text from shorthand**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • shorthand notes
4.	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts
	4.2 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced

Unit 216

Prepare text from recorded audio instruction (40 wpm)

Level: 2

Credit value: 4

NDAQ number: L/601/2486

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAD313.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the task of preparing text from recorded audio instruction**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.2 – 3.3 3.5 – 3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced

Level: 2

Credit value: 3

NDAQ number: R/601/2487

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAD321.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to organise and report data that has been researched

Assessment Criteria

The learner can:

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

Outcome 2: Be able to organise data

Assessment Criteria

The learner can:

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

Outcome 3: Be able to report data

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li data-bbox="635 293 927 331">• feedback obtained
3.	3.1 – 3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li data-bbox="635 539 767 577">• letters<li data-bbox="635 580 767 618">• emails<li data-bbox="635 620 783 658">• memos<li data-bbox="635 660 911 698">• examples of data

Level: 2

Credit value: 4

NDAQ number: Y/601/2488

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 17 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAD323.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand procedures for researching information

Assessment Criteria

The learner can:

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

Outcome 2: Be able to research information for others

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 2.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • notes of informal meetings

2.2 – 2.3 2.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
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2.5 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• records
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Unit 219

Store and retrieve information

Level: 2

Credit value: 3

NDAQ number: R/601/2490

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 17 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAD332.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand processes and procedures for storing and retrieving information

Assessment Criteria

The learner can:

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

Outcome 2: Be able to store information

Assessment Criteria

The learner can:

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

Outcome 3: Be able to retrieve information

Assessment Criteria

The learner can:

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

3.5 Provide information in the agreed format and timescale

3.6 Deal with, or refer problems if required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• information
	2.2 – 2.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
3.	3.1 3.3 – 3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• information
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

Level: 2

Credit value: 2

NDAQ number: Y/601/2491

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 13 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAD334.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand procedures for archiving information

Assessment Criteria

The learner can:

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

Outcome 2: Be able to archive information

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.10	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.2 2.4 2.6 – 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • information
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	2.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records

Unit 221 Use office equipment

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

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA231.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Know about different types of office equipment and its uses

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 7: Be able to use office equipment

Assessment Criteria

The learner can:

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

Evidence requirements

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

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7. 7.1 - 7.9 Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- letters
 - emails
 - memos

Unit 222

Maintain and issue stationery stock items

Level: 2

Credit value: 3

NDAQ number: M/601/2495

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAF141.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand procedures for maintaining and issuing stationery stock items

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 5: Be able to maintain stationery stock levels

Assessment Criteria

The learner can:

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

Outcome 6: Be able to issue items from stationery stock

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 - 2.2	
3.	3.1 – 3.2	
4.	4.1	
5.	5.1	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	5.2 - 5.3 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • stock records
	5.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • purchase orders
	5.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • delivery notes

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

Unit 223

Support the organisation of an event

Level: 2

Credit value: 2

NDAQ number: L/601/2505

Unit aim

This unit is about supporting the organisation of an event.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA311.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the role and purpose of providing support with the organisation of an event

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.10	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Level: 2

Credit value: 3

NDAQ number: D/601/2508

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA311.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the role and purpose of supporting the co-ordination of an event**Assessment Criteria**

The learner can:

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

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

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• evaluation reports

Unit 225

Support the organisation of business travel or accommodation

Level: 2

Credit value: 3

NDAQ number: Y/601/2510

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA321.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose of confirming a brief and budget for business travel or accommodation**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • briefs • budgets
	3.2 – 3.5 3.7 – 3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records

Level: 2

Credit value: 4

NDAQ number: T/601/2515

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA411.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the arrangements to be made to support the planning and organising of meetings**Assessment Criteria**

The learner can:

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

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

The learner can:

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

Outcome 3: Be able to follow up a meeting

Assessment Criteria

The learner can:

- 3.1 Follow organisation procedures for clearing a meeting room
- 3.2 Circulate a meeting record to agreed timescales
- 3.3 Make sure arrangements for payments have been met, if required
- 3.4 Contribute to the evaluation of arrangements made for meetings, as required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 2.3 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• event documentation
	2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• budgets
	2.7 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• records
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

3.2 – 3.4

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

- letters
- emails
- memos

Unit 227

Respond to change in a business environment

Level: 2

Credit value: 3

NDAQ number: F/601/2517

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA111.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the causes and effects of change in a business environment**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

Outcome 4: Be able to respond to change

Assessment Criteria

The learner can:

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

Outcome 5: Be able to support the evaluation of change

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.8	
3.	3.1 – 3.3	
4.	4.1 4.4	Evidence may be supplied via candidate reports/reflective accounts
	4.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	4.3	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• Tasks completed
	4.5. – 4.7	Evidence may be supplied via witness testimony and candidate reports/reflective accounts

5.	5.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• feedback given by learner
	5.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos

Unit 228

Support the management and development of an information system

Level: 2

Credit value: 7

NDAQ number: J/601/2518

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAD121.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to contribute to the management of an information system

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

- 3.6 Identify and report problems when they occur
- 3.7 Resolve problems within limits of own authority

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.7	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • training records • diary
	3.2 3.6 – 3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • diary
	3.3 – 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, and candidate reports/reflective accounts
4.	4.1 – 4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • feedback • minutes of meetings

Unit 229

Meet and welcome visitors

Level: 2

Credit value: 3

NDAQ number: Y/601/2457

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 23 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAC311.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand procedures for meeting and welcoming visitors

Assessment Criteria

The learner can:

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

Outcome 2: Be able to meet and welcome visitors

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 - 2.2 2.4 – 2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role .
	2.3 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • visitors book

Unit 230

Administer human resource records

Level: 2

Credit value: 3

NDAQ number: T/601/2790

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAB151.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to create personnel files for new starters**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 6: Be able to maintain Human Resource information

Assessment Criteria

The learner can:

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

Outcome 7: Be able to report Human Resource information

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Unit 231

Administer the recruitment and selection process

Level: 2

Credit value: 4

NDAQ number: A/601/2791

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAB152.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to advertise job vacancies**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

- 3.1 Describe organisational procedures used to shortlist the applicants

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

Outcome 4: Understand how to administer the appointment process

Assessment Criteria

The learner can:

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

Outcome 5: Be able to advertise job vacancies

Assessment Criteria

The learner can:

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

Outcome 6: Be able to respond to potential applicants

Assessment Criteria

The learner can:

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

Outcome 7: Be able to administer the selection process

Assessment Criteria

The learner can:

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

Outcome 8: Be able to administer the appointment process

Assessment Criteria

The learner can:

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

Level: 2

Credit value: 4

NDAQ number: J/601/2647

Unit aim

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

Learning outcomes

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

The learner will be able to:

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

Guided learning hours

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

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration BAB131.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the organisational and legal context for administering parking dispensations**Assessment Criteria**

The learner can:

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

Outcome 2: Understand the processes involved in administering parking dispensations**Assessment Criteria**

The learner can:

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

Outcome 3: Be able to receive and process applications for parking dispensations**Assessment Criteria**

The learner can:

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

Outcome 4: Be able to issue documentation for parking dispensations

Assessment Criteria

The learner can:

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

Unit 301 Manage own performance in a business environment

Level: 3
Credit value: 3
NDAQ number: L/601/2519

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA626.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to plan and prioritise work and be accountable to others**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of planning work, and being accountable to others for own work
- 1.2 Explain the purpose and benefits of negotiating realistic targets for work and ways of doing so
- 1.3 Describe ways of prioritising targets and setting timescales for own work
- 1.4 Describe the types of problems that may occur during work, and ways of dealing with them
- 1.5 Explain the purpose and benefits of keeping other people informed about progress
- 1.6 Explain the purpose and benefits of letting other people know in good time if work plans need to be changed
- 1.7 Explain the purpose and benefits of recognising and learning from mistakes
- 1.8 Explain the purpose of guidelines, procedures and codes of practice that are relevant to own work

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

The learner can:

- 2.1 Explain the purpose and benefits of setting high standards for own work
- 2.2 Describe ways of setting high standards for own work
- 2.3 Describe ways of dealing with pressure arising from work tasks
- 2.4 Explain the purpose and benefits of accepting setbacks and dealing with them
- 2.5 Explain the purpose and benefits of being assertive and its meaning in work tasks
- 2.6 Give examples of work situations where it is necessary to be assertive
- 2.7 Explain the purpose and benefits of being ready to take on new challenges and adapt to change
- 2.8 Explain the purpose and benefits of treating others with honesty, respect and consideration
- 2.9 Describe types of behaviour at work that show honesty, respect and consideration and those that do not
- 2.10 Explain the purpose of helping and supporting others at work, and the purpose and benefits of doing so

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

Assessment Criteria

The learner can:

- 3.1 Negotiate and agree realistic targets and achievable timescales for own work
- 3.2 Prioritise targets for own work
- 3.3 Plan work tasks to make best use of own time, effective working methods and available resources
- 3.4 Identify and deal with problems occurring in own work, using the support of other people if necessary
- 3.5 Keep other people informed of progress
- 3.6 Complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time
- 3.7 Take responsibility for own work and accept responsibility for any mistakes made
- 3.8 Evaluate results of mistakes made and make changes to work and methods, as required
- 3.9 Follow agreed work guidelines, procedures and, where needed, codes of practice

Outcome 4: Behave in a way that supports effective working

Assessment Criteria

The learner can:

- 4.1 Set high standards for own work and demonstrate drive and commitment in achieving these standards
- 4.2 Adapt work and working methods to deal with setbacks and difficulties
- 4.3 Use own needs and rights when necessary to achieve work tasks and priorities
- 4.4 Look to engage with opportunities, and agree to take on new challenge(s)
- 4.5 Look for opportunities, and change ways of working, to meet new requirements
- 4.6 Treat other people with honesty respect and consideration
- 4.7 Help and support other people in work tasks

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.10	

3.	3.1 - 3.2 3.4 - 3.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • appraisals • performance reviews
	3.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • appraisals • performance reviews • plans • to do lists
	3.7 - 3.9	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role</p>
4.	4.1 - 4.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role</p>

Unit 302

Evaluate and improve own performance in a business environment

Level: 3

Credit value: 3

NDAQ number: F/601/2520

Unit aim

This unit is about evaluating and improving your own performance in the workplace.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA626.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

- 1.1 Explain the purpose and benefits of continuously improving own performance in a business environment
- 1.2 Explain the purpose and value of encouraging and accepting feedback from others
- 1.3 Describe ways of evaluating own work
- 1.4 Explain the purpose and benefits of trying out possible improvements to own work
- 1.5 Evaluate how learning and development can improve own work, benefit organisations, and further own career
- 1.6 Compare possible career progression routes
- 1.7 Describe possible development opportunities
- 1.8 Justify the value of developing a learning plan

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

The learner can:

- 2.1 Encourage and accept feedback from other people
- 2.2 Evaluate own work and use feedback from others to identify areas for improvement
- 2.3 Identify changes in ways of working needed to improve work performance
- 2.4 Complete work tasks using changed ways of working
- 2.5 Evaluate work completed and changed ways of working for improvements and effectiveness

Outcome 3: Be able to use evaluation of own performance to agree, develop and use a learning plan**Assessment Criteria**

The learner can:

- 3.1 Evaluate own performance and identify where further learning and development will improve own work
- 3.2 Agree and develop a learning plan to improve own work performance, that meets own needs
- 3.3 Follow a learning plan for improvement to own work

- 3.4 Review progress against learning plan and make updates for improving own work and further learning

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1– 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews
	2.2 2.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews • self evaluation
	2.3 2.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews
3.	3.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
	3.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews • learning plan
	3.3 - 3.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews • learning plans

Level: 3

Credit value: 4

NDAQ number: J/601/2521

Unit aim

This unit is about being able to behave and make positive contributions to work tasks and procedures, in a business environment, in ways that support diversity, reduction of waste and improve efficiency, show respect for property and security, and which minimise risk.

Learning outcomes

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

The learner will:

- 1 Understand the purpose and benefits of respecting and supporting other people at work
- 2 Understand how to maintain security and confidentiality at work and deal with concerns
- 3 Understand how to assess, manage and monitor risk in the workplace
- 4 Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow
- 5 Understand procedures for disposal of hazardous materials
- 6 Understand ways of supporting sustainability in an organisation
- 7 Be able to respect and support other people at work in an organisation
- 8 Be able to maintain security and confidentiality
- 9 Be able to assess, manage and monitor risk
- 10 Be able to support the minimisation of waste in an organisation
- 11 Be able to follow procedures for the disposal of hazardous waste in an organisation
- 12 Be able to support sustainability in an organisation

Guided learning hours

It is recommended that 21 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAF173.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose and benefits of respecting and supporting other people at work**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose of supporting other people at work
- 1.2 Explain the purpose of helping other people to work effectively and efficiently
 - a for individuals
 - b for organisations
- 1.3 Explain what is meant by diversity and why it should be valued
- 1.4 Outline the benefits of diversity to an organisation
- 1.5 Explain how to treat other people in a way that is sensitive to their needs
- 1.6 Explain how to treat other people in a way that respects their abilities, background, values, customs and beliefs
- 1.7 Describe ways in which it possible to learn from others at work

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

The learner can:

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

Outcome 3: Understand how to assess, manage and monitor risk in the workplace**Assessment Criteria**

The learner can:

- 3.1 Describe sources of risk in an organisation, including health and safety
- 3.2 Explain how to assess and monitor risks in an organisation
- 3.3 Describe ways of minimising risk in an organisation

Outcome 4: Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow

Assessment Criteria

The learner can:

- 4.1 Describe the purpose and benefits of keeping workplace waste to a minimum
- 4.2 Describe the main causes of waste that may occur in a business environment
- 4.3 Describe ways of minimising waste, including using technology and other procedures
- 4.4 Explain the purpose and benefits of recycling
- 4.5 Describe organisational procedures for recycling materials, and their purpose
- 4.6 Describe ways in which waste may be minimised by regularly maintaining equipment

Outcome 5: Understand procedures for disposal of hazardous materials

Assessment Criteria

The learner can:

- 5.1 Explain the purpose of procedures for the recycling and disposal of hazardous materials
- 5.2 Describe procedures for the recycling and disposal of hazardous materials for an organisation

Outcome 6: Understand ways of supporting sustainability in an organisation

Assessment Criteria

The learner can:

- 6.1 Explain the benefits to an organisation of improving efficiency and minimising waste over time
- 6.2 Describe ways of continuously improving own working methods and use of technology to achieve maximum efficiency and minimum waste
- 6.3 Outline ways of selecting sources of materials and equipment that give best value for money

Outcome 7: Be able to respect and support other people at work in an organisation

Assessment Criteria

The learner can:

- 7.1 Complete work tasks with other people in a way that shows respect for
 - a backgrounds
 - b abilities
 - c values, customs and beliefs
- 7.2 Complete work tasks with other people in a way that is sensitive to their needs
- 7.3 Use feedback and guidance from other people to improve own way of working

- 7.4 Follow organisational procedures and legal requirements in relation to discrimination legislation in own work

Outcome 8: Be able to maintain security and confidentiality

Assessment Criteria

The learner can:

- 8.1 Keep property secure, following organisational procedures and legal requirements, as required
- 8.2 Keep information secure and confidential, following organisational procedures and legal requirements
- 8.3 Follow organisational procedures to report concerns about security / confidentiality to an appropriate person or agency, as required

Outcome 9: Be able to assess, manage and monitor risk

Assessment Criteria

The learner can:

- 9.1 Identify and agree possible sources of risk in own work
- 9.2 Identify and agree new risks in own work, as required
- 9.3 Assess and confirm the level of risk
- 9.4 Identify and agree ways of minimising risk in own work
- 9.5 Monitor risk in own work
- 9.6 Use outcomes of assessing and dealing with risk to make recommendations, as required

Outcome 10: Be able to support the minimisation of waste in an organisation

Assessment Criteria

The learner can:

- 10.1 Complete work tasks keeping waste to a minimum
- 10.2 Use technology in own work tasks in ways that minimise waste

Outcome 11: Be able to follow procedures for the disposal of hazardous waste in an organisation

Assessment Criteria

The learner can:

- 11.1 Follow procedures for recycling and disposal of hazardous materials in own work tasks, as required

Outcome 12: Be able to support sustainability in an organisation

Assessment Criteria

The learner can:

- 12.1 Follow procedures for the maintenance of equipment in own work
- 12.2 Review own ways of working, including use of technology, and make suggestions for improving efficiency
- 12.3 Select and use equipment and materials in own work in ways that give best value for money
- 12.4 Support other people in ways that maximises their effectiveness and efficiency

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.7	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1 – 3.3	
4.	4.1 – 4.6	
5.	5.1 – 5.2	
6.	6.1 – 6.3	
7.	7.1 - 7.2 7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	7.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • appraisals • performance reviews
8.	8.1 - 8.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	8.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts, case study and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • memos • emails
9.	9.1 - 9.5	Evidence may be supplied via witness testimony and candidate reports/reflective accounts

	9.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
10.	10.1 - 10.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
11.	11.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
12.	12.1 12.3 - 12.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	12.2	Evidence may be supplied via witness testimony and candidate reports/reflective accounts.

Unit 304

Communicate in a business environment

Level: 3

Credit value: 3

NDAQ number: K/601/2527

Unit aim

This unit is about being able to select and use information and different styles of communication, in order to communicate clearly, accurately and effectively, in writing and verbally, with other people in a business environment.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA615.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

- 1.1 Explain the benefits of knowing the purpose of communication
- 1.2 Explain the reasons for knowing the audience to whom communications are presented
- 1.3 Explain the purpose of knowing the intended outcomes of communications
- 1.4 Describe different methods of communication and when to use them

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

The learner can:

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

Outcome 3: Understand how to communicate verbally**Assessment Criteria**

The learner can:

- 3.1 Describe ways of verbally presenting information and ideas clearly
- 3.2 Explain ways of making contributions to discussions that help to achieve objectives

- 3.3 Describe ways of adapting verbal contributions to suit different audiences, purposes and situations
- 3.4 Describe how to use and interpret body language
- 3.5 Describe how to use and interpret tone of voice
- 3.6 Describe methods of active listening
- 3.7 Describe the benefits of active listening
- 3.8 Explain the purpose of summarising verbal communication

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

Assessment Criteria

The learner can:

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

Outcome 5: Be able to plan communication

Assessment Criteria

The learner can:

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

Outcome 6: Be able to communicate in writing

Assessment Criteria

The learner can:

- 6.1 Find and select information that supports the purpose of written communications
- 6.2 Present information using a format, layout, style and house style suited to the purpose and method of written communications
- 6.3 Use language that meets the purpose of written communications and the needs of the audience
- 6.4 Organise structure and present written information so that it is clear and accurate, and meets the need of different audiences
- 6.5 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning of written communication is clear
- 6.6 Proofread and check written communications and make amendments, as required
- 6.7 Confirm what is 'important' and what is 'urgent'
- 6.8 Produce written communications to meet agreed deadlines
- 6.9 Keep a file copy of written communications sent

Outcome 7: Be able to communicate verbally

Assessment Criteria

The learner can:

- 7.1 Verbally present information and ideas to others clearly and accurately
- 7.2 Make verbal contributions to discussion(s) that suit the audience, purpose and situation
- 7.3 Use body language and tone to meet the needs of the audience, purpose and situation
- 7.4 Actively listen to information given by other people, and make relevant verbal responses
- 7.5 Ask relevant verbal questions to clarify own understanding, as required
- 7.6 Summarise verbal communication(s) and make sure that the correct meaning has been understood

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.4	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.11	
3.	3.1 – 3.8	
4.	4.1 – 4.2	
5.	5.1 – 5.3	
6.	6.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• information selected

	6.2 – 6.6 6.8 – 6.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • information formatted
	6.7	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
7.	7.1 7.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • presentation
	7.2 7.5 – 7.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • minutes of meetings
	7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role
8.	8.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • feedback received
	8.2	Evidence may be supplied via candidate reports/reflective accounts

Unit 305

Solve business problems

Level: 3

Credit value: 4

NDAQ number: L/601/2522

Unit aim

This unit is about recognising that there is a problem with the way work is being carried out in a business environment and analysing the problem for possible causes.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAG127.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand business problems and their causes

Assessment Criteria

The learner can:

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

Outcome 2: Understand techniques for solving business problems

Assessment Criteria

The learner can:

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

Outcome 3: Understand factors that influence solutions to business problems

Assessment Criteria

The learner can:

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

Outcome 4: Understand how to evaluate approaches to solving business problems

Assessment Criteria

The learner can:

- 4.1 Describe ways of evaluating approaches to solving business problems
- 4.2 Describe ways of evaluating solutions to problems for effectiveness

Outcome 5: Be able to recognise and analyse business problems

Assessment Criteria

The learner can:

- 5.1 Recognise a business problem
- 5.2 Confirm own understanding of a business problem
- 5.3 Identify reasons for a business problem
- 5.4 Analyse a business problem, getting additional information, as required
- 5.5 Work with others to agree what the business problem is

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1 – 3.2	
4.	4.1 – 4.2	

5.	5.1 - 5.3	Evidence may be supplied via candidate reports/reflective accounts
	5.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	5.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
6.	6.1	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	6.2 6.4 - 6.6 6.8 - 6.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	6.3 6.7	Evidence may be supplied via candidate reports/reflective accounts
7.	7.1 - 7.3	

Unit 306

Work with other people in a business environment

Level: 3

Credit value: 4

NDAQ number: R/601/2523

Unit aim

This unit is about working with other people, in a way that achieves agreed goals and objectives for the organisation and the team.

Learning outcomes

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

The learner will:

- 1 Understand how to support an organisation's overall mission and purpose
- 2 Understand how to work as a team to achieve goals and objectives
- 3 Understand how to communicate as a team
- 4 Understand the contribution of individuals within a team
- 5 Understand how to deal with problems and disagreements
- 6 Understand the purpose of feedback when working as a team
- 7 Be able to work in a team to achieve goals and objectives
- 8 Be able to deal with problems in a team
- 9 Be able to share feedback on objectives in a team

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAG1211.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to support an organisation's overall mission and purpose

Assessment Criteria

The learner can:

- 1.1 Explain how the organisation works
- 1.2 Explain the organisation's mission and purpose
- 1.3 Compare how the organisation works with other different types of organisations
- 1.4 Explain your main responsibilities, how these fit into the organisation's structure, and how these contribute to achieving your organisation's mission
- 1.5 Define policies, procedures, systems and values of your organisation relevant to your role
- 1.6 Describe when it is appropriate to seek guidance from others when unsure about objectives, policies, systems procedures and values

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

Assessment Criteria

The learner can:

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

Outcome 3: Understand how to communicate as a team

Assessment Criteria

The learner can:

- 3.1 Explain when it is essential to communicate with the people working within a team
- 3.2 Compare and contrast different methods of communication and when to use them
- 3.3 Explain the benefits of effective communication within a team

Outcome 4: Understand the contribution of individuals within a team

Assessment Criteria

The learner can:

- 4.1 Explain the purpose and benefits of acknowledging the strengths of others
- 4.2 Explain the purpose and benefits of respecting individuals working within a team

Outcome 5: Understand how to deal with problems and disagreements

Assessment Criteria

The learner can:

- 5.1 Explain the types of problems and disagreements that may occur when working with others
- 5.2 Evaluate ways of resolving problems and disagreements when working with others

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

Assessment Criteria

The learner can:

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

Outcome 7: Be able to work in a team to achieve goals and objectives

Assessment Criteria

The learner can:

- 7.1 Work in a way that supports your organisation's overall mission
- 7.2 Follow policies, systems and procedures relevant to your job
- 7.3 Contribute to improving objectives, policies, systems, procedures and values in a way that is consistent with your role
- 7.4 Put your organisation's values into practice in all aspects of your work
- 7.5 Seek guidance from others when not sure about objectives, policies, systems, procedures and values
- 7.6 Communicate effectively with other people in a team
- 7.7 Share work goals, priorities and responsibilities with a team
- 7.8 Agree work objectives and quality measures with a team, to achieve a positive outcome
- 7.9 Make sure work goals and objectives are achieved in a way makes best use of all abilities in a team
- 7.10 Provide support to members of a team, as required
- 7.11 Show respect for individuals in a team
- 7.12 Make sure the team produces quality work on time

Outcome 8: Be able to deal with problems in a team

Assessment Criteria

The learner can:

- 8.1 Identify problem(s) or disagreement(s) in a team
- 8.2 Resolve problem(s) or disagreement(s), referring if required

Outcome 9: Be able to share feedback on objectives in a team

Assessment Criteria

The learner can:

- 9.1 Share constructive feedback on achievement of objectives with a team
- 9.2 Receive constructive feedback on own work
- 9.3 Share feedback on achievement of objectives to identify improvements in own work, and that of the team

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.6	
3.	3.1 – 3.3	
4.	4.1 – 4.2	
5.	5.1 – 5.2	
6.	6.1 – 6.2	
7.	7.1 - 7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	7.5 - 7.8 7.10 - 7.12	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos
	7.9	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
8.	8.1	

8.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos	
9.	9.1 - 9.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• appraisals• performance reviews

Unit 307

Contribute to decision-making in a business environment

Level: 3

Credit value: 3

NDAQ number: Y/601/2524

Unit aim

This unit is about contributing to the decision making process made in a business environment.

Learning outcomes

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

The learner will:

- 1 Understand the purpose and process of decision-making
- 2 Understand how to prepare to contribute to decision-making
- 3 Understand how to contribute to decision-making
- 4 Be able to prepare contributions to decision-making
- 5 Be able to make contributions to decision-making

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAG121.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

Outcome 2: Understand how to prepare to contribute to decision-making**Assessment Criteria**

The learner can:

- 2.1 Understand the purpose of knowing the context in which a decision is being made
- 2.2 Describe the role and responsibilities of a person contributing to decision-making
- 2.3 Describe possible limitations on a person contributing to decision-making
- 2.4 Identify sources of information that can be used to inform decision-making
- 2.5 Explain how to research information to be used to inform decision-making

Outcome 3: Understand how to contribute to decision-making**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of contributing to meetings and other discussions where decisions are being made, and ways of doing so
- 3.2 Explain how to structure own ideas and information
- 3.3 Explain the purpose and benefits of respecting other people's contributions to the decision-making process
- 3.4 Explain the purpose of listening and responding to other people during the decision-making process, and ways of doing so
- 3.5 Explain how to use evidence, argument, questioning and assertiveness to influence outcomes
- 3.6 Explain the purpose of collective responsibility

Outcome 4: Be able to prepare contributions to decision-making**Assessment Criteria**

The learner can:

- 4.1 Identify sources of information needed

4.2 Research and collect information to add value to the decision-making process

Outcome 5: Be able to make contributions to decision-making

Assessment Criteria

The learner can:

- 5.1 Present information to others and develop ideas, using accurate and current information
- 5.2 Make constructive, relevant and timely contributions to meeting(s) or other discussions to contribute to making a decision
- 5.3 Provide additional information, when asked, to contribute to making a decision
- 5.4 Contribute to identifying and agreeing criteria for making a decision
- 5.5 Contribute to structuring ideas and information in a way that helps other people understand own ideas
- 5.6 Listen to other people's contributions adapting own ideas as necessary
- 5.7 Contribute to reviewing information provided for a decision to be made
- 5.8 Confirm support for an agreed decision

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1 – 3.6	
4.	4.1	Evidence may be supplied via candidate reports/reflective accounts
	4.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information collected • research carried out
5.	5.1 5.3 5.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information presented • letters • emails • memos

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

- minutes of meetings

5.4 - 5.7 Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Level: 3

Credit value: 5

NDAQ number: D/601/2525

Unit aim

This unit is about preparing for, and carrying out straightforward negotiations with other parties, in a business environment, in order to reach an agreement on an activity or activities that meets the needs of an organisation.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAG123.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

- 1.1 Outline the main principles of negotiations
- 1.2 Outline the process of negotiation and how it is used in business
- 1.3 Outline the purpose of different negotiation strategies and techniques
- 1.4 Explain the value of understanding the roles of other negotiators
- 1.5 Explain the purpose of knowing limits of own responsibility in negotiations
- 1.6 Explain the purpose of having clear objectives for negotiations

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

The learner can:

- 2.1 Explain the purpose of being flexible during negotiations while seeking to achieve the main objectives
- 2.2 Explain the purpose of keeping to the brief during negotiations
- 2.3 Explain the purpose of keeping to own level of authority during negotiations
- 2.4 Explain the purpose of referring issues to others, as required
- 2.5 Explain the purpose of keeping goodwill during negotiations, and ways of doing so
- 2.6 Explain when it might be necessary to withdraw from negotiations
- 2.7 Explain how to withdraw from negotiations in a way that maintains goodwill

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

The learner can:

- 3.1 Explain the purpose of achieving an outcome that meets main objectives
- 3.2 Explain the purpose of keeping an accurate record of negotiations, if required

Outcome 4: Be able to prepare for negotiation**Assessment Criteria**

The learner can:

- 4.1 Identify objectives to be achieved
- 4.2 Identify potential problems in negotiation(s) and ways of overcoming them

Outcome 5: Be able to conduct negotiations

Assessment Criteria

The learner can:

- 5.1 Carry out negotiations within limits of own authority
- 5.2 Make proposals which meet main objectives
- 5.3 Use negotiation strategy to obtain results that meet minimum or agreed outcomes
- 5.4 Clarify other negotiator's understanding, and respond to their queries
- 5.5 Suggest solutions to deal with problems, if required
- 5.6 Refer the negotiation to others, when required
- 5.7 Carry out negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation

Outcome 6: Be able to complete negotiations

Assessment Criteria

The learner can:

- 6.1 Reach an agreement to the satisfaction of all those involved in the negotiations, where possible
- 6.2 Maintain records of the negotiations, if required
- 6.3 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.7	
3.	3.1 – 3.2	
4.	4.1 - 4.2	Evidence may be supplied via candidate reports/reflective accounts
5.	5.1 - 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1	
		<ul style="list-style-type: none">• letters• memos• emails• minutes of meetings

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

- records
- minutes of meetings

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

Unit 309

Supervise a team in a business environment

Level: 3

Credit value: 6

NDAQ number: H/601/2526

Unit aim

This unit is about supervising the work of a team in a business environment to make sure that work is planned, carried out, supervised and monitored and evaluated for possible improvements in ways of working individually and as a team.

Learning outcomes

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

The learner will:

- 1 Understand the purpose and benefits of team work
- 2 Understand the purpose of communication in teams, and how to do so
- 3 Understand the purpose of planning work with teams, and how to do so
- 4 Understand the value of people in a team and how to respect and support them
- 5 Understand the purpose and benefits of assessing and evaluating the work of a team and how to do so
- 6 Be able to supervise a team
- 7 Be able to assess, evaluate and improve the work of a team

Guided learning hours

It is recommended that 52 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAG1212.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose and benefits of team work**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of working with other people to achieve agreed goals and objectives
- 1.2 Describe situations in which supervision of others can achieve positive outcomes

Outcome 2: Understand the purpose of communication in teams, and how to do so**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of different methods of communication with and within teams, and when to use them
- 2.2 Explain when it is essential to communicate with others in a team

Outcome 3: Understand the purpose of planning work with teams, and how to do so**Assessment Criteria**

The learner can:

- 3.1 Describe the purpose and benefits of agreeing work goals and plans with a team, and how to do so
- 3.2 Explain how to schedule activities and resources for a team
- 3.3 Explain the purpose and benefits of agreeing quality measures and timescales with a team, and how to do so

Outcome 4: Understand the value of people in a team and how to respect and support them**Assessment Criteria**

The learner can:

- 4.1 Explain the purpose and benefits of recognising the strengths of individuals in a team and of balancing abilities in a team
- 4.2 Describe ways of giving work to teams so the best use is made of strengths and abilities
- 4.3 Explain the benefits of diversity in teams
- 4.4 Explain the purpose and benefits of respecting others

- 4.5 Describe situations in which team members might need support and how to provide this
- 4.6 Describe the types of problems and disagreements that may occur when working with a team and how to resolve them

Outcome 5: Understand the purpose and benefits of assessing and evaluating the work of a team and how to do so

Assessment Criteria

The learner can:

- 5.1 Describe the purpose of work assessment
- 5.2 Explain how to assess the work of teams and team members
- 5.3 Explain the purpose and benefits of giving opportunities to team members to assess their own work
- 5.4 Explain the purpose and benefits of giving and receiving constructive feedback, and how to do so
- 5.5 Explain how to make use of feedback to improve the work of others and the work of the team as a whole

Outcome 6: Be able to supervise a team

Assessment Criteria

The learner can:

- 6.1 Communicate with people in a team during work activities
- 6.2 Supervise work goals and plan work objectives, priorities and responsibilities for a team and individuals
- 6.3 Identify, agree and supervise opportunities for others to work to achieve agreed outcomes
- 6.4 Schedule activities and resources
- 6.5 Allocate work tasks and supervise best use of abilities within a team
- 6.6 Agree quality measures and timescales for a team
- 6.7 Provide support to members of a team, as required
- 6.8 Show respect for individuals in a team
- 6.9 Supervise production of work to agreed quality standards and timescales
- 6.10 Identify and solve problems and disagreements, or refer if necessary

Outcome 7: Be able to assess, evaluate and improve the work of a team

Assessment Criteria

The learner can:

- 7.1 Assess and evaluate the work of a team and individuals to identify strengths and areas for improvement
- 7.2 Make sure team members have opportunities to assess their own work for strengths and areas for improvement
- 7.3 Share feedback, and outcomes of assessing work with individuals and a team

- 7.4 Make and agree suggestions for improving the work of individuals and a team
- 7.5 Make sure individuals and a team are encouraged to improve work as an outcome of assessing work

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.2	
3.	3.1 – 3.3	
4.	4.1 – 4.6	
5.	5.1 – 5.5	
6	6.1 - 6.10	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • diaries • appraisals • performance reviews
7.	7.1 7.4 – 7.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	7.2 - 7.3	Evidence may be supplied via witness testimony and candidate reports/reflective accounts

Unit 310

Develop a presentation

Level: 3

Credit value: 3

NDAQ number: M/601/2528

Unit aim

This unit is about developing a presentation.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

Outcome 2: Be able to develop a presentation

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning

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

Level: 3

Credit value: 3

NDAQ number: T/601/2529

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

Outcome 2: Understand the techniques used in enhancing a presentation

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 4: Be able to deliver a presentation

Assessment Criteria

The learner can:

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

Outcome 5: Be able to evaluate a presentation

Assessment Criteria

The learner can:

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

Evidence requirements

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

4.	4.1	Evidence may be supplied via candidate reports/reflective accounts
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • presentation materials
	4.3 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • presentation notes • handouts • slides
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • feedback • evaluation sheets
	5.2 – 5.3	Evidence may be supplied via candidate reports/reflective accounts

Unit 312

Design and produce documents in a business environment

Level: 3

Credit value: 4

NDAQ number: M/601/2531

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA212.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the purpose and value of designing and producing high quality and attractive documents

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.7	
4.	4.1 4.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	4.2 – 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	4.5 – 4.8 4.10 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • documents produced

Unit 313

Prepare text from notes using touch typing (60 wpm)

Level: 3

Credit value: 4

NDAQ number: T/601/2532

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA216.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Unit 313

Prepare text from notes using touch typing (60 wpm)

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 3: Be able to prepare for tasks

Assessment Criteria

The learner can:

- 3.1 Agree the purpose, format and deadlines for texts

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

Assessment Criteria

The learner can:

- 4.1 Input texts using touch typing to a minimum speed of 60 words per minute

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.6	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
4.	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos

Unit 314

Prepare text from shorthand (80 wpm)

Level: 3

Credit value: 8

NDAQ number: A/601/2533

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAD312.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the task of preparing text from shorthand**Assessment Criteria**

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • Shorthand notes
4.	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and candidate reports/reflective accounts
	4.2 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced

Unit 315

Prepare text from recorded audio instruction (60wpm)

Level: 3

Credit value: 4

NDAQ number: F/601/2534

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAD314.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Unit 315

Prepare text from recorded audio instruction (60wpm)

Outcome 1: Understand the task of preparing text from recorded audio instruction

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 3: Be able to produce texts from audio recordings

Assessment Criteria

The learner can:

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

- 3.7 Store texts and original recording safely and securely following organisational procedures
- 3.8 Present texts to the required format, within the agreed deadlines

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.5	
3.	3.1 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	3.2 – 3.3 3.5 – 3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • documents produced

Unit 316

Support the design and development of an information system

Level: 3

Credit value: 7

NDAQ number: L/601/2536

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

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

Unit 317

Monitor information systems

Level: 3

Credit value: 7

NDAQ number: R/601/2537

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Evidence requirements

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

Level: 3

Credit value: 6

NDAQ number: Y/601/2538

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Outcome 3: Be able to analyse and evaluate data

Assessment Criteria

The learner can:

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

Outcome 4: Be able to report data

Assessment Criteria

The learner can:

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

Evidence requirements

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

Level: 3

Credit value: 5

NDAQ number: D/601/2539

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
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1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 - 3.3	
4.	4.1 4.3 - 4.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information used
	4.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • budgets
	4.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • orders • delivery notes
	4.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos
	4.7	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • contract
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and professional discussion
	5.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records of monitoring
	5.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos

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

Level: 3

Credit value: 4

NDAQ number: R/601/2540

Unit aim

This unit is about planning and organising an event.

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

- 3.1 Identify and evaluate different types of venue in terms of suitability for events and costs

- 3.2 Describe a range of resources that may be needed for events and illustrate how they may be used
- 3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event

Outcome 4: Be able to plan and organise an event

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1	
3.	3.1 – 3.3	

4.	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• briefs• budgets
	4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• plans
	4.3 – 4.16	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• event packs• training schedules

Unit 321

Co-ordinate an event

Level: 3

Credit value: 4

NDAQ number: Y/601/2541

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

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

Evidence requirements

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

Unit 322 Plan and organise meetings

Level: 3
Credit value: 5
NDAQ number: D/601/2542

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

Outcome 3: Be able to support running a meeting

Assessment Criteria

The learner can:

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

Outcome 4: How to follow up a meeting

Assessment Criteria

The learner can:

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

Evidence requirements

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

	2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • budget
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • agenda • meeting papers
	2.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
3.	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	3.2 – 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • meeting papers
4.	4.1 – 4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records
	4.3 – 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos

4.5 – 4.7

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

- evaluations

Level: 3

Credit value: 5

NDAQ number: H/601/2543

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

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

Evidence requirements

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

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

Unit 324

Evaluate the organisation of business travel or accommodation

Level: 3

Credit value: 2

NDAQ number: K/601/2544

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

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

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- 2.2 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- feedback received
 - questionnaires
-
- 2.3 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- records
-
- 2.4 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- letters
 - emails
 - memos
 - reports

Unit 325

Supervise an office facility

Level: 3

Credit value: 5

NDAQ number: T/601/2546

Unit aim

This unit is about supervising an office facility to make sure that the systems and procedures, facilities and equipment needed for the smooth running of the office are in place, and reviewing use for possible changes and new needs. It is also about maintaining and supervising the use of facilities and equipment, following health, safety and security procedures, making arrangements for repairs as needed, and giving advice and guidance to users.

Learning outcomes

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

The learner will:

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

Guided learning hours

It is recommended that 23 hours should be allocated for this unit, although patterns of delivery are likely to vary.

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

This unit directly relates to the Business and Administration NOS BAA121.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

- 2.1 Explain how to identify repairs needed to the facilities and equipment of an office
- 2.2 Describe procedures for dealing with repairs needed
- 2.3 Explain the types of problems that arise with the use and supervision of office facilities and equipment, and how to deal with them

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

The learner can:

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

Outcome 4: Be able to supervise an office facility

Assessment Criteria

The learner can:

- 4.1 Identify, agree and provide facilities and equipment for an office to meet the needs of users, in line with agreed budgets
- 4.2 Maintain facilities and equipment for an office to meet the needs of users
- 4.3 Supervise and monitor use of facilities and equipment for an office
- 4.4 Use and review the facilities, systems and procedures of an office, reporting changes in requirements, as needed
- 4.5 Make sure the equipment in an office is working correctly
- 4.6 Identify repairs needed to the facilities and equipment in an office and deal with or refer, as required
- 4.7 Maintain relationships with suppliers and look for opportunities to develop relationships
- 4.8 Make contributions to the review of an office environment in line with health, safety and security policy
- 4.9 Deal with problems with facilities and equipment in an office, or refer as required
- 4.10 Provide information and guidance to users on the facilities and equipment in an office
- 4.11 Explain priorities for the supply, maintenance and use of office facilities and equipment to users, as required
- 4.12 Monitor the use of office facilities

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.8	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.3	
4.	4.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• office facilities guides produced for users• office system reports• purchase orders• receipts• records of communications and meetings• requisition forms

4.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office system reports • purchase orders • receipts • records of communications and meetings • requisition forms
4.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • equipment usage logs • office facilities guides produced for users • office issues / problems logs • office monitoring records • office system reports • records of communications and meetings • staff training programmes
4.4 4.9	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office facilities guides produced for users • office issues / problems logs • office monitoring records • office systems reports • records of communications and meetings
4.5	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office monitoring records • office system reports • records of communications and meetings
4.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports / reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • equipment repair logs • office issues / problems logs • office monitoring records • purchase orders • receipts • records of communications and meetings • requisition forms

4.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • continuous professional development records • office issues/problem logs • personal development plans • records of communications and meetings
<hr/>	
4.8	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office facilities guides produced for users • office system reports • records of communications and meetings • risk assessment records
<hr/>	
4.10	<p>Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office facilities guides produced for users • records of communications and meetings
<hr/>	
4.11	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports / reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • office issues / problems logs • office systems reports • records of communications and meetings
<hr/>	
4.12	<p>Evidence may be supplied via witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • continuous professional development records • equipment usage logs • office issues / problems logs • office monitoring records • personal development plans • records of communications and meetings

Unit 326

Contribute to innovation in a business environment

Level: 3

Credit value: 4

NDAQ number: A/601/2547

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

This unit directly relates to the Business and Administration NOS BAA112.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

- 2.1 Explain the purpose of reviewing existing working methods, products or services
- 2.2 Explain ways of reviewing existing working methods, products or services
- 2.3 Identify sources of information for new approaches and solutions
- 2.4 Describe ways of collecting information on possible improvements
- 2.5 Explain the purpose of working with others when developing new approaches and solutions
- 2.6 Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so
- 2.7 Explain how to work with others to develop and agree an idea
- 2.8 Explain how to decide when an idea is, or is not possible
- 2.9 Explain the purpose of reviewing and learning from mistakes

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

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

- 5.1 Present and sell suggestions for new approaches and /or solutions
- 5.2 Communicate risks to others in a suitable format

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

Assessment Criteria

The learner can:

- 6.1 Contribute to the evaluation of ideas for new approaches and solutions using
 - a fit with organisational aims and objectives
 - b other agreed criteria
- 6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services
- 6.3 Contribute to the selling of ideas to others
- 6.4 Seek feedback on ideas, analyse feedback. and show a willingness to compromise
- 6.5 Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach / solution is possible

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.9	
3.	3.1 – 3.2	
4.	4.1 – 4.4	

5.	5.1 – 5.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 – 6.5	

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

Level: 3

Credit value: 5

NDAQ number: J/601/2549

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

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

The learner can:

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

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

The learner can:

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

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

The learner can:

- 3.1 Describe different types of methods available to monitor projects
- 3.2 Explain the purpose of making own contributions when evaluating projects

3.3 Describe how to learn lessons for the future for own work

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

Assessment Criteria

The learner can:

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

Outcome 5: Be able to contribute to running a project

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

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

4.	4.1 – 4.2 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • specifications
	4.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • Critical path analysis • GANTT charts
	4.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • risks identified • contingency plans
5.	5.1 5.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role

5.2 5.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings 	
5.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • adapted plans 	
5.4 5.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports 	
6.	6.1	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings
	6.2 – 6.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> • letters • emails • memos • minutes of meetings • reports

Unit 328

Deliver, monitor and evaluate customer service to internal customers

Level: 3

Credit value: 3

NDAQ number: A/601/2550

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the meaning of internal customer

Assessment Criteria

The learner can:

- 1.1 Describe what is meant by internal customers

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

- 9.1 Follow procedures, within agreed timescale, to

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

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

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10. 10.1 – 10.3 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:
- letters
 - emails
 - memos
 - feedback received

Unit 329

Deliver, monitor and evaluate customer service to external customers

Level: 3

Credit value: 3

NDAQ number: F/601/2551

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the meaning of external customers

Assessment Criteria

The learner can:

- 1.1 Describe what is meant by external customers

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

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

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

Assessment Criteria

The learner can:

- 9.1 Follow procedures, within agreed timescale, to

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

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

Assessment Criteria

The learner can:

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

Evidence requirements

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

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10. 10.1 – 10.3 Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- letters
 - emails
 - memos
 - feedback received

Unit 330

Agree a budget

Level: 3

Credit value: 4

NDAQ number: J/601/2552

Unit aim

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

Learning outcomes

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

The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to develop budgets

Assessment Criteria

The learner can:

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

Outcome 2: Be able to agree a budget

Assessment Criteria

The learner can:

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

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.6	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 - 2.2	Evidence may be supplied via candidate reports/reflective accounts
	2.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> • draft budget

2.4

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

- budget

Unit 344

Administer legal files

Level: 3

Credit value: 7

NDAQ number: H/601/7791

Unit aim

This unit aims to provide the learner with the skills and underpinning knowledge to open, maintain and administer legal files, review and close files, prepare final bills and store and arrange for files to be archived.

Learning outcomes

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

The learner will:

1. Understand legislative and organisational procedures for administering legal files
2. Understand the type of legal work they are responsible for
3. Understand how to open legal files
4. Understand how to maintain and administer a legal file
5. Understand how to close and archive a legal file
6. Be able to open a legal file
7. Be able to maintain and administer a legal file
8. Be able to close and archive a legal file

Guided learning hours

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

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration Administer Legal Files NOS.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand legislative and organisational procedures for administering legal files**Assessment Criteria**

The learner can:

- 1.1 Describe the administrative services that they are responsible for
- 1.2 Explain the limits and scope of their responsibilities and authority in providing administrative services
- 1.3 Explain the organisation's policies, procedures and constraints that affect administrative services in their area of responsibility
- 1.4 Describe the duty of confidentiality that applies when they are dealing with client information
- 1.5 Describe the specialist software used by the organisation for the recording and processing of legal cases
- 1.6 Explain the importance of accuracy and attention to detail when dealing with information in a legal context
- 1.7 Explain where and when to refer matters that are beyond their authority
- 1.8 Explain how to prioritise work and work to other peoples' priorities

Outcome 2: Understand the type of legal work they are responsible for**Assessment Criteria**

The learner can:

- 2.1 Describe the type of legal work that their department is involved in (for example, conveyancing, family law, commercial, litigation)
- 2.2 Interpret the particular legal terminology that is associated with different types of legal work

Outcome 3: Understand how to open legal files**Assessment Criteria**

The learner can:

- 3.1 Explain the organisation's procedures for opening files
- 3.2 Describe the different checks and searches that are needed
- 3.3 Explain how to carry out the different checks and searches
- 3.4 Explain the contents and purpose of a client care letter
- 3.5 Explain how to prepare a client care letter

Outcome 4: Understand how to maintain and administer a legal file**Assessment Criteria**

The learner can:

- 4.1 Describe the organisation's house-style for the presentation of files and documents

- 4.2 Describe the types of documents that are required
- 4.3 Explain how to prepare the different types of documents that are required
- 4.4 Explain how to carry out research required by the fee earner
- 4.5 Explain how to report progress to clients
- 4.6 Explain how to record costs and disbursements
- 4.7 Explain how time spent on a matter is monitored and recorded in their organisation
- 4.8 Describe the range of activity and documentation that needs to be noted within a file
- 4.9 Explain how and when to generate bills from the information in a file

Outcome 5: Understand how to close and archive a legal file

Assessment Criteria

The learner can:

- 5.1 Explain the types of documents, knowledge or data that might need to be added to the organisation's precedent, knowledge or data bank
- 5.2 Describe the organisation's procedures for closing and archiving files
- 5.3 Explain how to sort a file and identify materials that do not need to be kept

Outcome 6: Be able to open a legal file

Assessment Criteria

The learner can:

- 6.1 Carry out checks and searches as appropriate and report on outcomes to the fee earner
- 6.2 Receive money on account from clients as instructed and process in line with organisational requirements
- 6.3 Open a file and enter matter information
- 6.4 Generate client care letters

Outcome 7: Be able to maintain and administer a legal file

Assessment Criteria

The learner can:

- 7.1 Produce and amend correspondence and documents as instructed
- 7.2 Make sure all relevant timescales and dates are entered in appropriate diaries
- 7.3 Carry out research as instructed and report back to fee earner
- 7.4 Report progress to clients as instructed by fee earner
- 7.5 Make sure all costs and disbursements are recorded accurately
- 7.6 Make sure all file management activities conform to house-style and organisational requirements
- 7.7 Make sure all time spent on the matter is recorded accurately
- 7.8 Generate bills as requested, in accordance with instructions

Outcome 8: Be able to close and archive a legal file

Assessment Criteria

The learner can:

- 8.1 Review the file and identify any outstanding issues and unbilled disbursements
- 8.2 Report outstanding issues to the fee earner for resolution
- 8.3 Where necessary, deal with reimbursements
- 8.4 Check with the fee earner whether any documents, knowledge or data needs to be added to the firm's precedent, knowledge or data bank
- 8.5 Make sure the file is complete for preparation of the final bill
- 8.6 If appropriate, prepare the final bill
- 8.7 Complete file closing documentation
- 8.8 Check that the account shows a nil balance
- 8.9 Notify relevant people that the file is closing
- 8.10 Sort the file, removing unnecessary material
- 8.11 Check with the fee earner on the appropriate distribution of documents
- 8.12 Make sure that hard copies of electronic communications are in the file
- 8.13 Prepare a schedule of the file contents so that they can be readily retrieved
- 8.14 Correctly label files for storage
- 8.15 Amend records to show that the file is closed
- 8.16 Make arrangements for the file to be archived

Unit 345 Build case files

Level: 3
Credit value: 4
NDAQ number: K/601/7792

Unit aim

This unit aims to provide the learner with the skills and underpinning knowledge to receive and open case files, review and build case files, submit case files and follow up any actions.

Learning outcomes

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

The learner will be able to:

1. Understand the organisational and legal context for building case files
2. Understand how to handle information when building cases
3. Understand how to build a case file
4. Be able to build a case file

Guided learning hours

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

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration Build Case Files NOS.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the organisational and legal context for building case files**Assessment Criteria**

The learner can:

- 1.1 Describe the services that they are responsible for
- 1.2 Describe the limits and scope of their responsibilities and authority in providing these services
- 1.3 Explain their organisation's policies, procedures and constraints that affect services in their area of responsibility
- 1.4 Explain how to apply their organisation's policies and procedures
- 1.5 Describe the legislation, regulations and codes of practice that apply in the sector to their area of responsibility
- 1.6 Describe the working culture and practices in the sector
- 1.7 Explain their organisation's procedures for building cases
- 1.8 Describe when and to whom to refer matters that are beyond their authority

Outcome 2: Understand how to handle information when building cases**Assessment Criteria**

The learner can:

- 2.1 Explain the legal and organisational requirements covering the security and confidentiality of information
- 2.2 Clarify the purpose of accuracy and attention to detail when dealing with information in a legal context
- 2.3 Explain how to access and use the sources of information that are required
- 2.4 Describe their organisation's house style and requirements for presentation of case files and documentation

Outcome 3: Understand how to build a case file**Assessment Criteria**

The learner can:

- 3.1 Explain how to identify evidence and materials that have not been provided
- 3.2 Explain the types of evidence and materials that may be required
- 3.3 Explain how and where to obtain evidence and materials that have not been provided
- 3.4 Explain how to conduct interviews and gather evidence
- 3.5 Explain how to adapt communication to the needs of a witness or client
- 3.6 Describe the types of documentation and correspondence that might be required and how to produce them
- 3.7 Identify who to consult if further information is needed
- 3.8 Identify the timescales and deadlines that apply to the case
- 3.9 Explain the consequences of failing to meet given timescales and deadlines

3.10 Explain the types of follow-up action that may be required

Outcome 4: Be able to build a case file

Assessment Criteria

The learner can:

- 4.1 Receive and open a case file
- 4.2 Review the case file and identify additional evidence and materials required
- 4.3 Obtain all additional items of evidence and materials
- 4.4 Produce documents and correspondence
- 4.5 Consult other people where necessary
- 4.6 Make sure information is kept secure and confidential
- 4.7 Review the materials to make sure all the relevant information is present in order to proceed
- 4.8 Submit the case file on time

Unit 346

Manage case files

Level: 3

Credit value: 5

NDAQ number: M/601/7793

Unit aim

This unit aims to provide the learner with the skills and underpinning knowledge to receive, open, review, update, prepare for closure and close case files, prepare court bundles, process appeal documentation and follow up appeals actions.

Learning outcomes

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

The learner will be able to:

1. Understand the legislative and organisational requirements for managing case files
2. Understand how to handle case information
3. Understand how to manage case files
4. Be able to manage case files

Guided learning hours

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

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration Manage Case Files NOS.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the legislative and organisational requirements for managing case files**Assessment Criteria**

The learner can:

- 1.1 Explain the administrative services that they are responsible for
- 1.2 Explain the limits and scope of their responsibilities and authority in providing administrative services
- 1.3 Explain their organisation's policies, procedures in relation to administrative services
- 1.4 Explain the constraints that affect administrative services in their area of responsibility
- 1.5 Explain how to apply their organisation's policies and procedures
- 1.6 Describe the legislation, regulations and codes of practice that apply in the sector to their area of responsibility
- 1.7 Explain the working culture and practices in the sector
- 1.8 Describe their organisation's house style and requirements for presentation of correspondence and documents
- 1.9 Explain their organisation's procedures for closing and archiving case files
- 1.10 Explain where and when to refer matters that are beyond their authority

Outcome 2: Understand how to handle case information**Assessment Criteria**

The learner can:

- 2.1 Explain the legal and organisational requirements covering the security and confidentiality of information
- 2.2 Explain the importance of accuracy and attention to detail when dealing with information in a legal context
- 2.3 Explain how to carry out research and identify sources of information

Outcome 3: Understand how to manage case files**Assessment Criteria**

The learner can:

- 3.1 Explain the procedures for receiving and opening a case file
- 3.2 Describe the structure, format and content of a case file
- 3.3 Explain methods of liaising and communicating with relevant people
- 3.4 Describe how to keep a case file up to date
- 3.5 Describe the documents that are required for court bundles
- 3.6 Explain how to ensure that documentation is complete at each stage of the process
- 3.7 Identify who to consult if further information is needed
- 3.8 Explain the timescales and deadlines that apply to the case
- 3.9 Describe the consequences of failing to meet timescales and deadlines
- 3.10 Explain how to action and record hearing outcomes

- 3.11 Explain the appeal documentation required in relation to own area of work
- 3.12 Explain how to process appeal documentation in relation to own area of work
- 3.13 Describe how to record the outcome of an appeal

Outcome 4: Be able to manage case files

Assessment Criteria

The learner can:

- 4.1 Receive and open a case file
- 4.2 Review the file and plan its management to meet required deadlines
- 4.3 Obtain or identify the location of all file documents and materials
- 4.4 Produce and amend documents as requested
- 4.5 Liaise with the relevant people to progress the case
- 4.6 Keep the case file up to date, checking documentation is complete
- 4.7 Make sure information is kept secure and confidential
- 4.8 Prepare court bundles as requested, checking documentation is complete
- 4.9 Consult other people where necessary
- 4.10 Submit documents on time
- 4.11 Action and record hearing outcomes as necessary
- 4.12 Where necessary, process appeal documentation as requested
- 4.13 Liaise as appropriate with the relevant people to progress the appeal
- 4.14 Record the outcome of the appeal where relevant
- 4.15 Prepare the case file for closure
- 4.16 Notify relevant people that the case file is closing
- 4.17 Close the case file
- 4.18 Arrange for the case file to be archived.

Level: 3

Credit value: 8

NDAQ number: D/601/7787

Unit aim

This unit is about the application of knowledge and understanding of administrative support services in schools.

Learning outcomes

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

The learner will be able to:

1. Understand how to develop and maintain contacts in a school environment
2. Understand the environment in which the school operates
3. Understand how their own role contributes to the work of the school
4. Understand the policies and procedures they should follow in a school environment
5. Understand policies and procedures in relation to child protection and student welfare in a school environment
6. Understand the school's administrative systems and procedures
7. Understand how to handle confidential information in a school environment
8. Be able to develop and maintain contacts in a school environment
9. Be able to follow school procedures for relationships with other people
10. Be able to implement school administrative systems and procedures
11. Be able to handle confidential information in a school environment

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration BAB141.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand how to develop and maintain contacts in a school environment**Assessment Criteria**

The learner can:

- 1.1 Explain why it is important to build positive working relationships with contacts
- 1.2 Describe how to build positive working relationships with contacts
- 1.3 Clarify why it is important for the school to have a friendly and efficient way of dealing with contacts
- 1.4 Describe the types of contacts they deal with and the requirements that they have
- 1.5 Explain how to meet the needs of contacts
- 1.6 Explain why it is important to present a positive image of themselves and their school
- 1.7 Describe the types of problems that may occur with contacts – including conflict and aggression
- 1.8 Explain the procedures for dealing with the types of problems that may occur with contacts – including conflict and aggression
- 1.9 Describe the types of administrative and organisational support that they may be required to provide to school contacts and the wider community

Outcome 2: Understand the environment in which the school operates**Assessment Criteria**

The learner can:

- 2.1 Describe the social context in which the school operates, including the cultural diversity of the community
- 2.2 Explain how the social context in which the school operates impacts on the school environment

Outcome 3: Understand how their own role contributes to the work of the school**Assessment Criteria**

The learner can:

- 3.1 Explain how their own role contributes to the school's goals
- 3.2 Explain how their own role contributes to the school's improvement or development priorities
- 3.3 Explain how their own role supports teaching and learning
- 3.4 Clarify the limits of their own authority
- 3.5 Explain why it is important to act within the limits of own authority
- 3.6 Clarify when to refer issues to a higher authority
- 3.7 Identify who to refer issues to

Outcome 4: Understand the policies and procedures they should follow in a school environment

Assessment Criteria

The learner can:

- 4.1 Describe the policy context, wider issues and initiatives that affect the work of the school, (e.g. relevant authority policies; government standards, legislation and regulations; government initiatives; etc)
- 4.2 Explain the school's policy and administrative procedures for dealing with parents, guardians and carers
- 4.3 Clarify their roles and responsibilities in relation to the school's policy and administrative procedures for dealing with parents, guardians and carers
- 4.4 Explain their school's policy and administrative procedures for dealing with pupils and students
- 4.5 Clarify their roles and responsibilities in relation to their school's policy and administrative procedures for dealing with pupils and students
- 4.6 Explain the school's policy and administrative procedures for dealing with the wider community
- 4.7 Clarify their roles and responsibilities in relation to their school's policy and administrative procedures for dealing with the wider community

Outcome 5: Understand policies and procedures in relation to child protection and student welfare in a school environment

Assessment Criteria

The learner can:

- 5.1 Explain how to comply with policies and procedures relating to child protection and student welfare
- 5.2 Explain how to report concerns about child protection and student welfare to an appropriate person

Outcome 6: Understand the school's administrative systems and procedures

Assessment Criteria

The learner can:

- 6.1 Explain the purpose of school administration systems and procedures
- 6.2 Clarify why the school's administrative systems and procedures are important
- 6.3 Describe the school's administrative and organisational systems and procedures in relation to own role
- 6.4 Explain methods of analysing and evaluating information
- 6.5 Clarify the school's procedures for producing reports

Outcome 7: Understand how to handle confidential information in a school environment

Assessment Criteria

The learner can:

- 7.1 Explain how to identify confidential information in line with the school's procedures and relevant data protection legislation

- 7.2 Explain why confidential information should be safeguarded
- 7.3 Explain how to safeguard confidential information
- 7.4 Explain the limits of their authority in relation to confidential information
- 7.5 Clarify when to refer confidential information to the relative authority or appropriate person
- 7.6 Explain who to refer confidential information to (e.g. where concerns for a child's safety override confidentiality)

Outcome 8: Be able to develop and maintain contacts in a school environment

Assessment Criteria

The learner can:

- 8.1 Build positive working relationships
- 8.2 Present a positive image of themselves and their school
- 8.3 Communicate effectively with contacts

Outcome 9: Be able to follow school procedures for relationships with other people

Assessment Criteria

The learner can:

- 9.1 Follow school policies and procedures for dealing with parents, guardians and carers
- 9.2 Follow school policies and procedures for dealing with pupils and students
- 9.3 Follow school policies and procedures for dealing with colleagues and the wider community

Outcome 10: Be able to implement school administrative systems and procedures

Assessment Criteria

The learner can:

- 10.1 Provide effective administrative and organisational support to school contacts and the wider community
- 10.2 Operate school administration systems
- 10.3 Analyse and evaluate information
- 10.4 Produce reports in line with school procedures

Outcome 11: Be able to handle confidential information in a school environment

Assessment Criteria

The learner can:

- 11.1 Safeguard confidential information
- 11.2 Act within the limits of their authority
- 11.3 Refer issues beyond their authority to the appropriate person

Unit 348

Administer parking and traffic challenges, representatives and civil parking appeals

Level: 3

Credit value: 9

NDAQ number: L/601/2648

Unit aim

This unit covers the knowledge and understanding learners need to administer parking and traffic challenges, representations and civil parking appeals. It also covers the practical application of this knowledge and understanding.

Learning outcomes

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

The learner will be able to:

1. Understand the organisational and legal context for administering parking and traffic challenges, representations and appeals
2. Understand how to register receipt of challenges, representations and CPN appeals
3. Understand how to respond to challenges, representations and CPN appeals
4. Be able to register receipt of challenges, representations and CPN appeals
5. Be able to respond to challenges, representation and CPN appeals

Guided learning hours

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

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration BAB132.

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

This unit has been developed by the Council for Administration.

Assessment

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

Outcome 1: Understand the organisational and legal context for administering parking and traffic challenges, representations and appeals**Assessment Criteria**

The learner can:

- 1.1 Describe the services they are responsible for
- 1.2 Clarify the limits and scope of their responsibilities and authority in providing services
- 1.3 Explain their organisation's policies, procedures and constraints that affect services in their area of responsibility
- 1.4 Explain how to apply their organisation's policies, procedures and constraints in their work
- 1.5 Describe the current legislation, codes of practice and Traffic Regulation Orders that apply when dealing with challenges, representations and CPN appeals
- 1.6 Explain the requirements of the Data Protection Act and its implications for their role
- 1.7 Explain how to access and use the sources of information needed to deal with challenges, representations and CPN appeals
- 1.8 Interpret the documents that are used in parking control administration in relation to dealing with challenges, representations and CPN appeals

Outcome 2: Understand how to register receipt of challenges, representations and CPN appeals**Assessment Criteria**

The learner can:

- 2.1 Explain how to communicate effectively with customers in order to be clear about the nature of their enquiry
- 2.2 Clarify the courses of action available to customers
- 2.3 Clarify the information that is needed to consider a challenge, representation or CPN appeal
- 2.4 Explain why the specified information is required
- 2.5 Explain the criteria for cancellation
- 2.6 Clarify why it is important to record receipt of a challenge, representation or CPN appeal
- 2.7 Explain how to identify evidence that is reliable, valid and sufficient
- 2.8 Describe the information and evidence that has to be provided by the customer
- 2.9 Explain how to check that customer information is valid
- 2.10 Describe the specialist software used by their organisation for the recording and processing of challenges, representations and CPN appeals
- 2.11 Explain how to use the specialist software used by their organisation for the recording and processing of challenges, representations and CPN appeals

Outcome 3: Understand how to respond to challenges, representations and CPN appeals

Assessment Criteria

The learner can:

- 3.1 Describe the range of internal evidence that is needed to support a reliable decision
- 3.2 Explain where to obtain the internal information that is needed to support a reliable decision
- 3.3 Explain how to clarify the details of the customer's challenge, representation and CPN appeal through oral or written questioning
- 3.4 Clarify the limits of own responsibility in investigating challenges, representations and CPN appeals
- 3.5 Identify who to refer matters outside of own authority to
- 3.6 Explain how to identify and obtain evidence that has not been provided
- 3.7 Explain how to make decisions that are supported by the evidence and comply with current legal and organisational requirements
- 3.8 Identify the courses of action that a customer can take once a decision has been made
- 3.9 Explain the consequences of taking the courses of action that a customer can take once a decision has been made

Outcome 4: Be able to register receipt of challenges, representations and CPN appeals

Assessment Criteria

The learner can:

- 4.1 Respond promptly to a customer's initial enquiry with accurate advice
- 4.2 Record receipt of the written challenge, representation or CPN appeal
- 4.3 Make sure they have the information they need to understand the customer's case
- 4.4 Check the details of the documentation received for accuracy, consistency and validity
- 4.5 If the documentation fails to meet the requirements for considering the challenge, representation or CPN appeal promptly inform the customer of this and the courses of action they can take
- 4.6 If the customer's situation does not fall within recognised criteria for cancellation inform the customer of this and the courses of action they can take
- 4.7 At all stages, comply with organisational and legal requirements

Outcome 5: Be able to respond to challenges, representation and CPN appeals

Assessment Criteria

The learner can:

- 5.1 Collate evidence for response to the challenge, representation or CPN appeal
- 5.2 If necessary, take prompt action to suspend the enforcement process while the case is being investigated
- 5.3 Make sure all internal records are accurate, reliable, valid and up-to-date
- 5.4 Review the documentation to make sure there is sufficient evidence
- 5.5 Decide whether there is a need for additional evidence

- 5.6 Where necessary, obtain the additional items of evidence needed
- 5.7 Refer any matter which is beyond the limits of their responsibility to the appropriate person
- 5.8 Review all evidence and make a decision
- 5.9 Inform the customer, in writing and within agreed timescales, of the decision and the courses of action that they can take
- 5.10 Where appropriate, reactivate the enforcement process
- 5.11 Keep copies of all correspondence and update records
- 5.12 At all stages, comply with current organisational and legal requirements

Unit 349

Administer statutory parking and traffic appeals

Level: 3

Credit value: 9

NDAQ number: R/601/2649

Unit aim

This unit is about the skills, knowledge and understanding required to administer statutory parking and traffic appeals.

Learning outcomes

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

The learner will be able to:

1. Understand the organisational and legal context for administering statutory parking and traffic appeals
2. Understand how to prepare case evidence
3. Understand how to investigate the case for statutory appeal and decide how to proceed
4. Understand how to contest a statutory appeal
5. Understand how to respond to the outcome of a statutory appeal
6. Be able to prepare case evidence
7. Be able to investigate a case for statutory appeal and decide how to proceed
8. Be able to contest a statutory appeal
9. Be able to respond to the outcomes of a statutory appeal

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration BAB133.

Support of the unit by a sector or other appropriate body (if required)

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Unit 349

Administer statutory parking and traffic appeals

Outcome 1: Understand the organisational and legal context for administering statutory parking and traffic appeals

Assessment Criteria

The learner can:

- 1.1 Describe the services for which they are responsible
- 1.2 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility
- 1.3 Describe the rules that apply when dealing with statutory appeals (e.g. Codes of Conduct, Code of Practice)
- 1.4 Interpret Traffic Regulation Orders
- 1.5 Describe the current legislation that applies when dealing with statutory appeals (e.g. Traffic Management Act 2004)
- 1.6 Explain the requirements of the Data Protection Act and its implications for their role

Outcome 2: Understand how to prepare case evidence

Assessment Criteria

The learner can:

- 2.1 Describe the specialist software used by their organisation for the recording and processing of statutory appeals
- 2.2 Explain how to identify evidence that is sufficient, reliable and valid
- 2.3 Identify the information has to be provided
- 2.4 Explain how to check that information provided is accurate
- 2.5 Explain the grounds on which someone may appeal
- 2.6 Explain the grounds on which someone may file a statement of truth
- 2.7 Clarify the importance of acting within the given deadline for the case and the consequences of failing to do so
- 2.8 Clarify the limits of their responsibility in investigating statutory appeals
- 2.9 Identify to whom matters outside own authority should be referred

Outcome 3: Understand how to investigate the case for statutory appeal and decide how to proceed

Assessment Criteria

The learner can:

- 3.1 Describe what evidence is needed and why
- 3.2 Explain how to identify evidence that has not been provided
- 3.3 Explain how to obtain evidence that has not been provided
- 3.4 Identify who to consult if further information is needed

Outcome 4: Understand how to contest a statutory appeal

Assessment Criteria

The learner can:

- 4.1 Explain how to prepare a case summary
- 4.2 Explain how to present a case summary
- 4.3 Clarify why it is important to present a case summary in the specified way
- 4.4 Explain how to prepare the documentation for a case that is not to be contested
- 4.5 Explain the organisation's requirements for the presentation and organisation of documents for a statutory appeal hearing
- 4.6 Explain how to prepare to attend a hearing
- 4.7 Explain the Code of Conduct which regulates how to behave when attending a statutory appeal
- 4.8 Describe the kinds of further information that might be requested

Outcome 5: Understand how to respond to the outcome of a statutory appeal

Assessment Criteria

The learner can:

- 5.1 Describe the actions to take to close a case
- 5.2 Explain how to arrange for refunds of fees to be paid
- 5.3 Describe the records (paper and electronic) that need to be updated to record the outcome of the statutory appeal and how to do this
- 5.4 Identify who to inform of the outcomes of a statutory appeal
- 5.5 Clarify why it is important to inform specified persons of the outcomes of a statutory appeal
- 5.6 Explain the courses of action that are available to the appellant
- 5.7 Explain the courses of action that are available to the respondent
- 5.8 Describe what actions to take to reactivate the recovery process

Outcome 6: Be able to prepare case evidence

Assessment Criteria

The learner can:

- 6.1 Record receipt of the statutory appeal notification or revocation order
- 6.2 Take action to suspend the enforcement process during the investigation
- 6.3 Check the details of the documentation received for accuracy and consistency
- 6.4 Notify the appropriate person of any discrepancies
- 6.5 Understand the grounds on which the customer is appealing or the statement of truth has been filed
- 6.6 At all stages comply with current organisational and legal requirements
- 6.7 At all stages carry out work within the given deadline for the case

Outcome 7: Be able to investigate a case for statutory appeal and decide how to proceed

Assessment Criteria

The learner can:

- 7.1 Make sure all necessary evidence is present, accurate, valid and reliable
- 7.2 Identify and obtain any additional items of evidence that are needed
- 7.3 Where necessary consult other people to obtain further information
- 7.4 Refer any matter which is beyond the limits of own responsibility to the appropriate person
- 7.5 Review all evidence
- 7.6 Make and record a decision on the basis of the evidence
- 7.7 Where the decision is not to contest the statutory appeal or the statement of truth, make sure that the adjudicator and appellant or respondent are informed and that the decision has been recorded properly
- 7.8 At all stages comply with current organisational and legal requirements

Outcome 8: Be able to contest a statutory appeal

Assessment Criteria

The learner can:

- 8.1 Prepare a case summary in accordance with organisational guidelines and relevant codes of practice
- 8.2 Collate, label and present documentation in the format required by the appeals service
- 8.3 Make sure copies of documentation are provided to all relevant people
- 8.4 Make sure that they are prepared to respond to requests for further information including when a statutory appeal is referred by an adjudicator to an independent person to consider mitigation
- 8.5 If they attend the hearing, ensure that they are fully conversant with the case and comply with the Code of Conduct for personal attendance

Outcome 9: Be able to respond to the outcomes of a statutory appeal

Assessment Criteria

The learner can:

- 9.1 On receiving notification of the outcome of the statutory appeal, update all records in accordance with organisational and legal requirements
- 9.2 Proceed with the case as appropriate to the outcomes of the statutory appeal
- 9.3 Review and consider the adjudicator's feedback
- 9.4 Take appropriate actions in response to the adjudicator's feedback

Level: 3

Credit value: 9

NDAQ number: J/601/2650

Unit aim

This unit covers the knowledge and understanding learners need to administer parking and traffic debt recovery. It also covers the practical application of this knowledge and understanding.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will be able to:

1. Understand the organisational and legal context for administering parking and traffic recovery
2. Understand the processes involved in debt recovery
3. Be able to administer parking and traffic debt recovery

Guided learning hours

It is recommended that 54 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards (if appropriate)

This unit directly relates to the Business and Administration BAB134.

Support of the unit by a sector or other appropriate body (if required)

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the organisational and legal context for administering parking and traffic recovery**Assessment Criteria**

The learner can:

- 1.1 Describe the services they are responsible for
- 1.2 Clarify the limits and scope of their responsibilities and authority in providing services
- 1.3 Explain their organisation's policies, procedures and constraints that affect services in own area of responsibility
- 1.4 Explain how to apply their organisation's policies, procedures and constraints that affect services in own area of responsibility
- 1.5 Describe the current legislation and regulations that apply
- 1.6 Explain the requirements of the Data Protection Act and its implications for own role
- 1.7 Explain the criteria, policy and procedures in relation to debt recovery (e.g. for non-collection, write off, case closure, tracing and recovery, maximising debt collection, reporting, performance management)
- 1.8 Explain the debt recovery process within the organisation

Outcome 2: Understand the processes involved in debt recovery**Assessment Criteria**

The learner can:

- 2.1 Explain the role of Traffic Enforcement Centre and/or the magistrates court in the debt recovery process
- 2.2 Describe the debt recovery documentation to be served
- 2.3 Explain how to serve debt recovery documentation
- 2.4 Describe the case evidence that may be used
- 2.5 Explain how to investigate a case
- 2.6 Clarify the limits of own responsibility
- 2.7 Identify to whom matters outside own authority should be referred
- 2.8 Describe the range of possible outcomes of a case
- 2.9 Identify the appropriate actions to take for each possible outcome of a case
- 2.10 Clarify the role of debt recovery agents and other agencies
- 2.11 Explain how to communicate effectively with debt recovery agents and other outside agencies
- 2.12 Clarify the importance of the audit trail
- 2.13 Explain how to update and maintain records as necessary
- 2.14 Describe the reports that are required
- 2.15 Explain how and when to produce required reports
- 2.16 Explain how to close a case in line with organisational policy and relevant legislation

Outcome 3: Be able to administer parking and traffic debt recovery

Assessment Criteria

The learner can:

- 3.1 Monitor the quality of the data to be registered at Traffic Enforcement Centre (TEC) or magistrates court
- 3.2 Ensure debt recovery documentation is served in accordance with organisational policy and relevant legislation
- 3.3 Investigate the case and prepare case evidence in accordance with organisational policy and relevant legislation
- 3.4 Review all evidence; make and record a decision on the basis of the evidence
- 3.5 Where the decision is not to pursue the case make sure that relevant people are informed and that the decision has been recorded properly
- 3.6 Where the decision is to pursue the case, proceed in accordance with organisational policy and relevant legislation
- 3.7 Respond appropriately to the outcomes of the case, review feedback and take appropriate action
- 3.8 Liaise with debt recovery agents
- 3.9 Liaise with outside agencies
- 3.10 Monitor the performance of debt recovery agents
- 3.11 Produce relevant reports
- 3.12 Update and maintain records in line with organisational policy and relevant legislation
- 3.13 At all stages carry out work within the given deadlines for the case
- 3.14 Close the case in accordance with organisational policy and relevant legislation

Level: 4

Credit value: 7

NDAQ number: T/601/2563

Unit aim

This unit is about designing and developing an information system that will meet identified needs in a business environment.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of information systems in a business environment
- 2 Understand how to design and develop an information system
- 3 Be able to design and develop an information system

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD112.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of information systems in a business environment**Assessment Criteria**

The learner can:

- 1.1 Evaluate the types of information that need to be managed in a business environment
- 1.2 Analyse the types of information systems available and their main features

Outcome 2: Understand how to design and develop an information system**Assessment Criteria**

The learner can:

- 2.1 Analyse the purpose and benefits of identifying and agreeing user needs for an information system
- 2.2 Explain the purpose and benefits of developing a system specification based on agreed needs
- 2.3 Analyse ways of developing a specification for an information system
- 2.4 Analyse ways of creating and developing an information system based on agreed needs
- 2.5 Explain the purpose and benefits of testing an information system during development

Outcome 3: Be able to design and develop an information system**Assessment Criteria**

The learner can:

- 3.1 Identify and analyse the information to be managed
- 3.2 Identify the resources available
- 3.3 Develop a system specification within agreed budget, as required
- 3.4 Develop an information system that meets the specification
- 3.5 Test the system
- 3.6 Identify, report and remedy faults

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	

2.	2.1 – 2.5	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
3.	3.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information identified
	3.2	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • resources identified
	3.3	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • specification • budgets
	3.4	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information system • specification
	3.5	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • test results • feedback
	3.6	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports

Level: 4

Credit value: 6

NDAQ number: A/601/2564

Unit aim

This unit is about managing and evaluating an information system that meets identified needs in a business environment. The learner will use knowledge of needs, to work in collaboration with others as required, to manage and evaluate the system.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Understand how to manage an information system
- 2 Understand how to review and further develop an information system
- 3 Be able to manage an information system
- 4 Be able to evaluate an information system

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAD112.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand how to manage an information system**Assessment Criteria**

The learner can:

- 1.1 Analyse how to plan and agree implementation of the information system
- 1.2 Analyse the purpose and benefits of managing information to meet requirements
- 1.3 Explain the purpose and benefits of providing training to users and providing on-going support
- 1.4 Explain the purpose of complying with legal and organisation requirements when using an information system
- 1.5 Explain the purpose and benefits of monitoring use of an information system
- 1.6 Analyse ways of monitoring use of an information system
- 1.7 Explain the purpose and benefits of maintaining and updating an information system
- 1.8 Analyse ways of maintaining and updating an information system
- 1.9 Analyse the types of problems that may occur with an information system and how to deal with them

Outcome 2: Understand how to review and further develop an information system**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of continuously improving an information system
- 2.2 Analyse ways of evaluating an information system
- 2.3 Explain how to identify problems in an information system and analyse them
- 2.4 Analyse ways of resolving problems in an information system

Outcome 3: Be able to manage an information system**Assessment Criteria**

The learner can:

- 3.1 Provide training on the use of an information system
- 3.2 Provide on-going support to users
- 3.3 Monitor use of accuracy and productivity of an information system to meet organisational requirements
- 3.4 Make sure legal and organisational requirements for handling information are followed
- 3.5 Make sure an information system is maintained and updated, if required
- 3.6 Identify, analyse and resolve problems when they occur

Outcome 4: Be able to evaluate an information system

Assessment Criteria

The learner can:

- 4.1 Collect feedback on performance of an information system
- 4.2 Evaluate feedback and prioritise development needs of an information system, if required
- 4.3 Provide information to enable further information system development

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• training records
	3.2 3.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• notes of meetings
	3.3 – 3.5	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
4.	4.1 – 4.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• reports• notes of meetings

Unit 418

Contribute to innovation in a business environment

Level: 4

Credit value: 6

NDAQ number: K/601/2575

Unit aim

This unit is about identifying and evaluating new ideas for innovation in the business environment.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and benefits of innovation in a business environment
- 2 Understand how to research, develop and review ideas for new approaches and solutions
- 3 Understand how to present suggestions for new approaches and solutions
- 4 Be able to research and develop ideas for new approaches and solutions
- 5 Be able to present suggestions for new approaches and solutions
- 6 Be able to evaluate, review and make suggestions for new approaches and solutions

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA113.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and benefits of innovation in a business environment**Assessment Criteria**

The learner can:

- 1.1 Evaluate the purpose of innovation as a way of staying competitive and offering new solutions
- 1.2 Explain the purpose of questioning existing ways of working and assumptions about them

Outcome 2: Understand how to research, develop and review ideas for new approaches and solutions**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose of reviewing existing products and services, and ways of doing so
- 2.2 Evaluate ways of reviewing existing products and services
- 2.3 Identify sources of information for new approaches and solutions
- 2.4 Describe ways of collecting information on possible improvements
- 2.5 Explain the purpose of working with others when developing new approaches and solutions
- 2.6 Explain the purpose and benefits of working with others when agreeing how to present ideas to decision-makers
- 2.7 Evaluate how to work with others to develop and agree an idea
- 2.8 Explain the purpose and benefits of acknowledging contributions made by others
- 2.9 Explain how to evaluate ideas, including cost / benefit and impact analysis
- 2.10 Explain how to question assumptions to develop concepts and propositions
- 2.11 Explain the purpose of reviewing and learning from mistakes

Outcome 3: Understand how to present suggestions for new approaches and solutions**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose of selling ideas to decision-makers
- 3.2 Analyse how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome

- 3.3 Explain the purpose of risk analysis
- 3.4 Explain when it is appropriate to take 'acceptable' risks
- 3.5 Evaluate the purpose and benefits of accepting feedback
- 3.6 Explain how to develop and document proposals for change

Outcome 4: Be able to research and develop ideas for new approaches and solutions

Assessment Criteria

The learner can:

- 4.1 Question constructively existing ways of working in own area of responsibility
- 4.2 Research and identify possible improvements to working methods, services or products in own area of responsibility
- 4.3 Collect information that can be used to develop ideas for new approaches and solutions
- 4.4 Carry out a risk analysis
- 4.5 Agree criteria for evaluating ideas including fit with organisational aims and objectives

Outcome 5: Be able to present suggestions for new approaches and solutions

Assessment Criteria

The learner can:

- 5.1 Put forward a formal proposal of new approaches and / or solutions
- 5.2 Communicate risks to others in a suitable format

Outcome 6: Be able to evaluate, review and make suggestions for new approaches and solutions

Assessment Criteria

The learner can:

- 6.1 Identify the cost and benefits of new ideas to include
 - a) resources required
 - b) assessment of impact on others
- 6.2 Evaluate ideas for new approaches and solutions using
 - a) fit with organisational aims and objectives
 - b) other agreed criteria
- 6.3 Evaluate ideas to challenge own assumptions and thinking about ways of working
- 6.4 Put forward a formal proposal to persuade decision-makers of the benefits of your idea(s)
- 6.5 Communicate and sell ideas to others
- 6.6 Seek feedback on ideas, analyse feedback, and show a willingness to adapt
- 6.7 Assess idea(s) and decide whether a suggestion for a new approach / solution is possible

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.2	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.11	
3.	3.1 – 3.6	
4.	4.1 – 4.2 4.5	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings
	4.3	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information collected
	4.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • risk assessment
5.	5.1 – 5.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 - 6.5 6.7	<ul style="list-style-type: none"> • letters • emails • memos • reports • minutes of meetings • formal proposal
	6.6	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • feedback received

Unit 419

Plan change for a team

Level: 4

Credit value: 6

NDAQ number: M/601/2576

Unit aim

This unit is about planning changes across teams in a department or part of an organisation at the level of a departmental manager or director.

Learning outcomes

There are **six** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose and value of planning change
- 2 Understand the role of the team and individuals in planning change
- 3 Understand the purpose and value of communication when planning change
- 4 Understand the purpose and value of negotiation and dealing with problems when planning change
- 5 Be able to identify and develop opportunities for change for a team
- 6 Be able to plan change for a team

Guided learning hours

It is recommended that 22 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA114.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose and value of planning change**Assessment Criteria**

The learner can:

- 1.1 Explain the purpose and benefits of planning change for a team to organisations, individuals and a team

Outcome 2: Understand the role of the team and individuals in planning change**Assessment Criteria**

The learner can:

- 2.1 Explain the purpose and benefits of engaging the team and individuals in planning change
- 2.2 Explain the purpose and benefits of encouraging the team and individuals to feel that they are making contributions to planning change
- 2.3 Explain the purpose and benefits of using a team and individuals to challenge ways of working constructively and creatively when planning change

Outcome 3: Understand the purpose and value of communication when planning change**Assessment Criteria**

The learner can:

- 3.1 Explain the purpose and benefits of having goals for changes in a team and communicating them to those involved
- 3.2 Explain the purpose and benefits of making sure decision-makers are committed to planned changes

Outcome 4: Understand the purpose and value of negotiation and dealing with problems when planning change**Assessment Criteria**

The learner can:

- 4.1 Explain the purpose and benefits of being adaptable during change planning and the change process
- 4.2 Explain the purpose and benefits of being able to renegotiate plans for changes
- 4.3 Analyse the types of problems and risks that may occur while planning change
- 4.4 Explain ways of responding to problems while planning change
- 4.5 Explain the purpose and benefits of dealing with problems when planning change

Outcome 5: Be able to identify and develop opportunities for change for a team

Assessment Criteria

The learner can:

- 5.1 Recognise opportunities for change for a team
- 5.2 Review options for change in terms of the constraints, risks, benefits, costs and implications for a team
- 5.3 Identify the risks and benefits for a team associated with options for change
- 5.4 Persuade the team to commit itself to change

Outcome 6: Be able to plan change for a team

Assessment Criteria

The learner can:

- 6.1 Encourage individuals and the team to challenge existing ways of working and put forward new ideas
- 6.2 Plan change for a team identifying vision, goals, objectives, timescales and resources
- 6.3 Agree plans for change with relevant decision-makers, as required

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.3	
3.	3.1 – 3.2	
4.	4.1 – 4.5	
5.	5.1 - 5.3	Evidence may be supplied via witness testimony and candidate reports/reflective accounts
	5.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
6.	6.1 6.3	<ul style="list-style-type: none">• letters• emails• memos• reports• presentations• minutes of meetings• initial plan

6.2

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- plan
- letters
- emails
- memos
- reports
- minutes of meetings

Unit 420 Manage budgets

Level: 4
Credit value: 5
NDAQ number: T/601/2580

Unit aim

This unit is about managing and monitoring a budget for a department or section within an organisation.

Learning outcomes

There are **five** learning outcomes to this unit.

The learner will:

- 1 Understand the purpose of budgets
- 2 Understand how to manage budgets
- 3 Understand how to report performance against budgets
- 4 Be able to manage budgets
- 5 Be able to monitor budgets

Guided learning hours

It is recommended that 29 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Business and Administration NOS BAA533.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Council for Administration.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Council for Administration Assessment Strategy 2009.

Outcome 1: Understand the purpose of budgets

Assessment Criteria

The learner can:

- 1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently
- 1.2 Identify legal, regulatory and organisational requirements for managing a budget
- 1.3 Describe different types of budgetary systems and their features

Outcome 2: Understand how to manage budgets

Assessment Criteria

The learner can:

- 2.1 Describe methods for monitoring, controlling and recording income and expenditure
- 2.2 Describe ways in which costs may be minimised in own area of responsibility
- 2.3 Identify situations in which corrective action may be needed
- 2.4 Describe the scope of own authority for managing a budget and authorising expenditure

Outcome 3: Understand how to report performance against budgets

Assessment Criteria

The learner can:

- 3.1 Explain the purpose and benefits of reporting information on performance against budget
- 3.2 Explain how to check the accuracy of budget calculations
- 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets

Outcome 4: Be able to manage budgets

Assessment Criteria

The learner can:

- 4.1 Control budget performance within limits and deadlines
- 4.2 Analyse and take action to minimise costs where possible
- 4.3 Take corrective action to make sure of best value for money
- 4.4 Authorise expenditure within the scope of own authority

Outcome 5: Be able to monitor budgets

Assessment Criteria

The learner can:

- 5.1 Record transactions, as required
- 5.2 Produce information on performance against budget, when required
- 5.3 Make sure all calculations are accurate
- 5.4 Record information that will help with the preparation of future budgets

Evidence requirements

Learning Outcomes	Assessment Criteria	Assessment guidance
1.	1.1 – 1.3	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2.	2.1 – 2.4	
3.	3.1 – 3.3	
4.	4.1	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • budgets • financial records
	4.2 - 4.4	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • reports • budgets • financial records
5.	5.1	Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • records • budgets
	5.2	Evidence may be supplied via witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • information produced • budgets

-
- 5.3 Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- calculations
 - budgets
-
- 5.4 Evidence may be supplied via candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
- information produced
 - budgets

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLA assessments.

Appendix 2 **Matrix of evidence triangulated across units within each of the NVQ levels**

The following tables have been designed by the Council for Administration to show the accumulation of assessment evidence that has been generated for completion of either part of or the whole unit, which may be triangulated to other units at the same level.

There are no units for which assessment evidence can be triangulated outside the level of the unit for which assessment evidence has been generated.

The tables have been organised identifying the units against the competence categories in which they reside.

The horizontal line of unit numbers in the tables are the initial units from which assessment evidence may be generated. The vertical line of units identifies those units for which the assessment evidence generated by the units in the top horizontal line of units may be triangulated to. For example, at Level 1, unit 101 in 'Core Business and Administration' may generate assessment evidence which can be triangulated to units, 102, 103 or 106.

Level 1 units

CfA NOS category	Core Business and Administration					Communications		Customer Service	Document Production	Health and Safety	Manage Information and Data	
	101	102	103	105	106	104	107	108	109	112	110	111
4428 unit no.												
101		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
102	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
103	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
104								✓				
106	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
110												✓

Level 2 units

CfA NOS cate gory	Core Business and Administration					Business Resources		Communications				Customer Service			Document Production					Events and Meetings				Innovation and Change	Manage Information and Data				
	201	202	203	205	206	221	222	204	207	208	209	210	211	229	212	213	214	215	216	223	224	225	226	227	217	218	219	220	228
4428 unit no.																													
201		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
202	✓		✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
203	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
205	✓									✓	✓																		
206	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
211														✓															
217																										✓			
219																												✓	
220																											✓		
227	✓																												
229													✓																

Level 3 units

CfA NOS category	Core Business and Administration								Business Resources		Business Support Services	Communications			Customer Service		Document Production				Events and Meetings					Innovation and Change	Management Information and Data			Project Management
	301	302	303	305	306	307	308	309	319	330	325	304	310	311	328	329	312	313	314	315	320	321	322	323	324	326	316	317	318	327
4428 unit no.																														
301	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
302	✓			✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
303	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
304													✓	✓																
305							✓	✓		✓	✓														✓	✓	✓	✓	✓	✓
306	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
307				✓			✓	✓	✓	✓															✓					✓
308								✓		✓																				✓
309					✓						✓																			✓
310												✓		✓																
311												✓	✓																	
317																										✓				
328										✓																				

Level 4 units

CfA NOS category	Core Business and Administration								Business Resources		Business Support Services		Communicati ons	Events and Meetings	Innovation and Change		Manage Information and Data	
	401	402	403	404	405	407	408	409	412	420	415	417	406	413	418	419	410	411
4482 unit no.																		
401		✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
402	✓		✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
403				✓			✓	✓	✓	✓			✓	✓	✓			
404																		
405																		
407					✓		✓	✓	✓	✓					✓	✓	✓	✓
408					✓	✓		✓	✓	✓					✓	✓		
409									✓	✓						✓		
410																		✓
411																	✓	
415												✓						
417											✓							
420									✓									

Level 5 units

CfA NOS category	Innovation and Change	
4428 unit no.	503	504
503		✓
504	✓	

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Useful contacts

Type	Contact	Query
UK learners	T: +44 (0) 844 543 0033 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44(0) 844 543 0000 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

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