

Certificates and Diplomas in Business Administration (5528)

Level 1 & 2 Unit handbook for centres

August 2018 Version 5.1 (August 2018)



Qualification at a glance

Subject area	Business and Administration
City & Guilds number	5528
Age group approved	16+
Entry requirements	None
Assessment	By Portfolio/Assignment/Evolve
Centre Approval	Available
Support materials	Qualification handbook Assessment packs Text Book Smartscreen
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Version and date	Change detail	Section
2.0 March 2016	Units 104, 201-247 and 273-274 have been updated.	Units
3.0 June 2016	Units 104, 224, 225, 226 and 273 have been updated with equivalent Portfolio unit number	Units
4.0 February 2017	Amended credits for Unit 209	Units
5.0 February 2017	Amended credits for Unit 209	Units
5.1 August 2018	updated data protection legislation, removing reference to specific date of legislation	Throughout



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1 Units

Structure of units

These units each have the following:

- City & Guilds reference number
- Unit Accreditation Number (UAN)
- title
- level
- credit value
- guided learning hours
- unit aim
- learning outcomes which are comprised of a number of assessment criteria

Summary of units

Unit accreditation number	City & Guilds unit no.	Unit title	Credit value	Unit Level
D/506/1794	101	Health and safety in a business environment	2	1
K/506/1796	102	Use a telephone and voicemail system	2	1
A/506/1799	103	Meet and welcome visitors in a business environment	2	1
L/506/2083	104	Understand working in a customer service environment	3	1
L/506/1807	201	Manage diary systems	2	2
Y/506/1809	202	Produce business documents	3	2
L/506/1810	203	Collate and report data	3	2
R/506/1811	204	Store and retrieve information	4	2
Y/506/1812	205	Produce minutes of meetings	3	2
D/506/1813	206	Handle mail	3	2
H/506/1814	207	Provide reception services	3	2
K/506/1815	208	Prepare text from notes using touch typing	4	2

Unit accreditation number	City & Guilds unit no.	Unit title	Credit value	Unit Level
M/506/1816	209	Prepare text from shorthand	6	2
A/506/1818	211	Understand the use of research in business	6	2
T/506/1865	212	Archive information	3	2
Y/506/2295	213	Maintain and issue stationery and supplies	3	2
Y/506/2295	213	Maintain and issue stationery and supplies	3	2
J/506/1868	214	Use and maintain office equipment	2	2
L/506/1869	215	Contribute to the organisation of an event	3	2
D/506/1875	216	Organise business travel or accommodation	4	2
H/506/1876	217	Provide administrative support for meetings	4	2
T/506/1879	218	Administer human resource records	3	2
A/506/1883	219	Administer the recruitment and selection process	3	2
R/506/1887	220	Administer parking dispensations	3	2
R/506/1890	221	Administer finance	4	2
H/506/1893	222	Communication in a business environment	3	2
M/506/1895	223	Buddy a colleague to develop their skills	3	2
J/506/1899	224	Principles of providing administrative services	4	2
T/506/1901	225	Principles of business document production and information management	3	2

A/506/1964	226	Understand employer organisations	4	2
L/506/1905	227	Employee rights and responsibilities	2	2
R/506/2134	228	Process information about customers	3	2
Y/506/2149	229	Develop customer relationships	3	2
A/506/2130	230	Deliver customer service	5	2
Unit accreditation number	City & Guilds unit no.	Unit title	Credit value	Unit Level
D/502/9928	231	Principles of marketing theory	4	2
D/502/9931	232	Principles of digital marketing	5	2
F/502/4396	233	Bespoke software	3	2
F/502/4625	234	Spreadsheet software	4	2
F/505/6880	235	Exploring social media	2	2
F/601/8320	236	Processing customers' financial transactions	4	2
J/502/4559	237	Data management software	3	2
K/503/8194	238	Principles of customer relationships	3	2
L/506/1788	239	Manage personal performance and development	4	2
R/506/1789	240	Develop working relationships with colleagues	3	2
R/506/2294	241	Principles of team leading	5	2
M/502/4300	242	Using email	3	2
M/502/4622	243	Presentation software	4	2
R/502/4628	244	Word processing software	4	2

R/502/4631	245	Website software	4	2
R/505/3515	246	Know how to publish, integrate and share using social media	5	2
T/505/1238	247	Payroll processing	5	2
J/506/1806	273	Principles of equality and diversity in the workplace	2	2
L/505/3514	274	Understand the safe use of online and social media platforms	4	2

Unit 101 Health and safety in a business environment

UAN:	D/506/1794
Level:	1
Credit value:	2
GLH:	10
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAE141 Use occupational and safety guidelines when using a workstation.
Aim:	<p>This unit aims to develop the knowledge and skills needed to cover health and safety in a business environment. Upon completion of this unit, learners will understand their health and safety responsibilities and will know how to work in a safe way in a business environment.</p> <p>Learners will also be able to comply with health and safety requirements in a business environment.</p>

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Understand health and safety responsibilities in a business environment.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 state health and safety responsibilities of employers 1.2 state their own responsibilities for health and safety in the business environment 1.3 state the occupational health and safety guidelines to be followed when using a keyboard and visual display unit 1.4 explain the importance of complying with health and safety requirements.

Learning outcome
The learner will: 2. Know how to work in a safe way in a business environment.
Assessment criteria
The learner can: 2.1 identify possible health and safety hazards in the business environment 2.2 describe ways in which accidents can be avoided in the business environment 2.3 outline why it is important to report hazards and accidents that occur in the business environment 2.4 outline organisational emergency health and safety procedures.

Learning outcome
The learner will: 3. Be able to comply with health and safety requirements in a business environment.
Assessment criteria
The learner can: 3.1 use approved techniques to prevent strain or injury when carrying out work activities 3.2 take action to ensure that their own conduct does not endanger others 3.3 follow manufacturers or organisational instructions for the use of equipment, materials and products 3.4 follow organisational procedures and legal requirements to minimise risks to health and safety.

Unit 102 Use a telephone and voicemail system

UAN:	K/506/1796
Level:	1
Credit value:	2
GLH:	20
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards: CFABAA621 Make and receive telephone calls</p> <ul style="list-style-type: none"> CFABAA622 Use voicemail message systems.
Aim:	<p>This unit aims to develop the knowledge and skills required to use a telephone and voicemail system. Upon completion of this unit, learners will be able to make telephone calls, receive telephone calls, and use voicemail systems.</p>

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Know how to use a telephone and voicemail system.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 outline how a caller's experiences affect their view of an organisation 1.2 outline organisational standards and procedures for communicating on the telephone 1.3 state the importance of following organisational standards and procedures when making and receiving telephone calls 1.4 state organisational fault reporting procedures 1.5 describe why it is important to follow security and data protection procedures when using a telephone system 1.6 state the information to be given out when transferring calls, taking or leaving messages 1.7 state organisational guidelines for deleting voicemail messages.
Learning outcome

The learner will:
2. Be able to make telephone calls.

Assessment criteria

The learner can:
2.1 identify the reason for making a call
2.2 obtain the name and number(s) of the person to be contacted
2.3 communicate information to achieve the call objective(s)
2.4 communicate in a way that meets organisational standards and guidelines.

Learning outcome

The learner will:
3. Be able to receive telephone calls.

Assessment criteria

The learner can:
3.1 identify the caller in accordance with organisational procedures
3.2 deal with calls in accordance with organisational procedures
3.3 pass calls to the right person/department
3.4 take messages when the person to be contacted is unavailable
3.5 represent an organisation in a way that meets the required standards and guidelines.

Learning outcome

The learner will:
4. Be able to use voicemail systems.

Assessment criteria

The learner can:
4.1 use voicemail systems in accordance with manufacturers' instructions
4.2 keep the voicemail message system up to date
4.3 pass on accurate messages in accordance with organisational policies.

Unit 103 Meet and welcome visitors in a business environment

UAN:	A/506/1799
Level:	1
Credit value:	2
GLH:	20
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAC311 Meet and welcome visitors.
Aim:	This unit aims to develop the knowledge and skills required to meet and welcome visitors in a business environment. Upon completion of this unit, learners will be able to meet visitors in a business environment.

Learning outcome
The learner will: 1. Know how to meet visitors in a business environment
Assessment criteria
The learner can: 1.1 state an organisation's procedures for dealing with visitors 1.2 describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors 1.3 identify any organisational: <ul style="list-style-type: none"> a. health b. safety c. security requirements relevant to visitors 1.4 describe what to do and who to contact when problems with visitors arise.

Learning outcome

The learner will:

2. Be able to meet visitors in a business environment.

Assessment criteria

The learner can:

2.1 welcome visitors politely in accordance with organisational standards

2.2 confirm the identity of visitors and the reasons for their visit

2.3 check that any health, safety and security actions are carried out

2.4 record visitors' arrival and departure in accordance with organisational procedures

2.5 inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards

2.6 present a positive personal image in accordance with organisational standards.

Unit 104/654 Understand working in a customer service environment

UAN:	L/506/2083
Level:	1
Credit value:	3
GLH:	25
Assessment type:	E- volve or Portfolio of evidence
Relationship to NOS:	<p>This unit is linked to the Customer Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA4 Give customers a positive impression of yourself and your organization • CFACSB2 Deliver reliable customer service • CFACSC1 Recognise and deal with customer queries, requests and problems • CFACSF3 Show understanding of customer service principles
Assessment requirements specified by a sector or regulatory body:	N/A
Aim:	<p>This unit aims to develop knowledge and understanding regarding working effectively in a customer service environment. Upon completion of this unit, learners will have developed knowledge of the importance of customer service and an awareness of the factors affecting customer service. Learners will also know how to work in a customer service role and will know how to refer customer queries and problems to others.</p>

Learning outcome

The learner will:

1. Know the importance of customer service.

Assessment criteria

The learner can:

- 1.1 state what is meant by 'customer service'
- 1.2 state why effective customer service is important to an organisation.

Learning outcome

The learner will:

2. Know the factors affecting customer service.

Assessment criteria

The learner can:

- 2.1 outline the difference between an internal and an external customer
- 2.2 state how to identify customers' needs and expectations
- 2.3 list information sources needed to deliver reliable customer service
- 2.4 describe the relationship between customer expectations and customer satisfaction.

Learning outcome

The learner will:

3. Know how to work in a customer service role.

Assessment criteria

The learner can:

- 3.1 identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services
- 3.2 identify the job roles within a team delivering customer service
- 3.3 state the standards of personal presentation and behaviour expected by customer service staff in different organisations
- 3.4 state standards and practices that relate to a service offer within different types of organisation
- 3.5 describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
- 3.6 describe the procedures for protecting customers' personal information and safety
- 3.7 state the importance of protecting customers' personal information and safety.

Learning outcome
The learner will: 4. Know how to refer customer queries and problems to others.
Assessment criteria
The learner can: 4.1 describe types of customer behaviour that show when a customer is dissatisfied 4.2 state the procedures to be followed when dealing with customer queries or problems 4.3 state to whom to refer customer queries and problems.

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research and produced either a report or answered (in writing or orally) appropriate questions.

Any oral questioning must be recorded.

The report and/or questioning must show coverage of all assessment criteria.

Unit 201 Manage diary systems

UAN:	L/506/1807
Level:	2
Credit value:	2
GLH:	12
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA431 Use a diary system
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to communicate in a business environment. Upon completion of this unit, learners will be able to communicate in business both in writing and verbally.

Learning outcome
The learner will: 1. Understand the management of diary systems.
Assessment criteria
The learner can: 1.1 explain the importance of keeping diary systems up to date 1.2 describe the basis on which bookings and changes are prioritised 1.3 explain any constraints relating to making bookings for people or facilities 1.4 describe the types of problems that can occur when managing diaries.

Assessment Guidance
Diary systems: <ul style="list-style-type: none"> paper-based electronic wall chart
Prioritised: <ul style="list-style-type: none"> urgent and important non-urgent but important urgent but not important

- non-urgent and not important

Constraints:

- availability of room(s)
- costs involved
- availability of attendees

Evidence may be supplied by:

- professional discussion
- reflective account
- questioning

Learning outcome

The learner will:

2. Be able to manage diary systems.

Assessment criteria

The learner can:

2.1 obtain the information needed to make **diary entries**

2.2 make accurate and timely diary entries

2.3 respond to changes in a way that balances and meets the needs of those involved

2.4 communicate up-to-date information to everyone involved

2.5 keep diaries up-to-date

2.6 maintain the requirements of **confidentiality**.

Assessment Guidance

Diary entries:

- paper based
- electronic

Confidentiality:

eg show how passwords can be used, especially when dealing with sensitive or confidential information; follow organisational procedures and Data Protection Act.

Evidence may be supplied by:

- observation
- professional discussion
- witness testimony
- diary entries
- organisational policies and procedures

Unit 202 Produce business documents

UAN:	Y/506/1809
Level:	2
Credit value:	3
GLH:	24
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA211 Produce documents in a business environment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to produce business documents. Upon completion of this unit, learners will be able to prepare and distribute business documents.

Learning outcome
The learner will: 1. Understand how to prepare business documents.
Assessment criteria
The learner can: 1.1 explain the requirements for: <ul style="list-style-type: none"> a. language b. tone c. image d. presentation for different documents 1.2 explain how to integrate images into documents 1.3 describe how corporate identity impacts upon document production 1.4 explain the requirements of: <ul style="list-style-type: none"> a. data protection b. copyright c. intellectual property legislation relating to document production 1.5 describe organisational procedures for version control 1.6 describe security requirements relating to document production.

Assessment Guidance

Corporate identity:

Eg logos, branding, standing, mission statement

Version control:

Date and version number eg 01/14 V.1.1

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to prepare business documents.

Assessment criteria

The learner can:

2.1 identify the:

- a. **purpose**
 - b. **audience**
 - c. content
 - d. style
 - e. format
 - f. deadlines
- of a document

2.2. use document production **resources** in line with organisational guidelines

2.3 use correct:

- a. **grammar**
- b. **spelling**
- c. **punctuation**
- d. sentence structure

2.4 produce documents that meet the requirements within the agreed timescale.

Assessment Guidance

Purpose:

Eg brochure to promote a new product, leaflet for distribution, Annual General Meeting (AGM) report to shareholders etc.

Audience:

- formal/informal
- internal use or external customers/client

Resources:

- letterhead template
- report template
- appropriate software

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Spelling:

Examples below demonstrate how a similar word has a different meaning:

- accept; except
- advise; advice
- personnel; personal
- as well as words which are often spelt incorrectly
- accommodation – accomodation

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Evidence may be presented by:

- product
- questioning
- witness testimony
- reflective account
- observation

Learning outcome

The learner will:

3. Be able to distribute business documents.

Assessment criteria

The learner can:

3.1 provide **final documents** in the appropriate **medium** for authorised readers

3.2 specify restrictions and distribution lists in accordance with the requirements

3.3 maintain the requirements of security in the:

- a. production
- b. distribution
- c. storage of documents.

Assessment Guidance

Final documents:

- report
- catalogue
- brochure
- business cards
- complimentary slips
- design of letterhead

Medium:

A suitable form of communication as in any of the above mentioned.

Evidence may be supplied by:

- product
- witness testimony
- questioning
- observation.

Unit 203 Collate and report data

UAN	L/506/1810
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAD321 Collate and organise data.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to collate and report data. Upon completion of this unit, learners will be able to collate and report data.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> Understand how to collate and report data.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 describe the different ways that data can be organised 1.2 explain why data should be presented and reported in different ways 1.3 explain the use of text and diagrams in helping readers to understand the presented data 1.4 explain the requirements relating to: <ol style="list-style-type: none"> confidentiality data protection intellectual property copyright legislations.

Assessment Guidance

Organised:

- charts
- tables
- reports

Presented:

- facts
- numerical data

Evidence may be supplied by:

- report
- questions
- professional discussion

Learning outcome

The learner will:

2. Be able to collate data.

Assessment criteria

The learner can:

2.1 ensure that data collected is:

- a. complete
- b. accurate
- c. up-to-date

2.2 check the data against agreed **criteria**

2.3 **organise data** in a way that will enable meaningful analysis

2.4 meet agreed timescales in the collation of data.

Assessment Guidance

Criteria:

- the amount of detail required
- the time you have to complete the collating of data
- how the information will be used

Organise data:

This could be in any of the following formats:

- verbally
- oral presentation
- charts, graphs, tables
- brochures, leaflets
- formal report
- or a combination of all

Evidence may be supplied by:

- product
- reflective account
- witness testimony

- observation

Learning outcome

The learner will:

3. Be able to report data.

Assessment criteria

The learner can:

3.1 present data in the agreed reporting **format** and **house style**

3.2 report data within agreed timescale

3.3 distribute data reports to authorised readers.

Assessment Guidance**Format:**

- layout
- arrangement
- Design

House style:

The organisation's preferred way of presenting information, eg font style, size, etc.

Evidence may be supplied by:

- product
- witness testimony
- reflective account
- observation.

Unit 204

Store and retrieve information

UAN:	R/506/1811
Level:	2
Credit value:	4
GLH:	19
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none">• CFABAD332 Store and retrieve information using a filing system.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to store and retrieve information. Upon completion of this unit, learners will be able to gather, store and retrieve information.

Learning outcome
The learner will: 1. Understand information storage and retrieval.
Assessment criteria
The learner can: 1.1 describe systems and procedures for storing and retrieving information 1.2 outline legal and organisational requirements for information security and retention 1.3 explain how to create filing systems to facilitate information identification and retrieval 1.4 explain how to use different search techniques to locate and retrieve information 1.5 describe what to do when problems arise when storing or retrieving information.

Assessment Guidance

Systems:

- paper-based
- electronic

Procedures: Electronic

- title or subject
- category or reference number
- dated
- author
- storage end date Paper-based –
- alphabetical
- numerical
- chronological
- geographical
- by subject or category

Legal requirements:

- Freedom of Information Act
- Data Protection Act

Filing systems:

- vertical
- lateral

Identification:

- index guide
- folder tabs
- cross indexing

Problems:

- misfiling
- not up-to-date filing
- hardware
- software

You will also need to be aware about own level of authority and who to go to if any of the problems are outside own level of authority.

Evidence may be supplied by:

- reflective account
- questioning
- professional discussion.

Learning outcome

The learner will:

2. Be able to gather and store information.

Assessment criteria

The learner can:

2.1 gather the information required within the agreed timescale

2.2 store files and folders in accordance with organisational procedures

2.3 store information in approved locations

2.4 adhere to organisational policies and procedures, legal and ethical requirements.

Assessment Guidance**Evidence may be supplied by:**

- product
- reflective account
- observation
- questioning
- witness testimony.

Learning outcome

The learner will:

3. Be able to retrieve information.

Assessment criteria

The learner can:

3.1 confirm information to be retrieved and its intended use

3.2 retrieve the required information within the agreed timescale.

Assessment Guidance**Evidence may be supplied by:**

- product
- reflective account
- observation
- questioning
- witness testimony.

Unit 205 Produce minutes of meetings

UAN	Y/506/1812
Level:	2
Credit value:	3
GLH:	13
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA441 Take minutes.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to produce minutes of meetings. Upon completion of this unit, learners will be able to take notes of meetings and then produce minutes of meetings.

Learning outcome
The learner will: 1. Understand how to take minutes of meetings.
Assessment criteria
The learner can: 1.1 explain the purpose of different types of minutes and other meeting records 1.2 explain the legal requirements of formal minutes 1.3 describe organisational conventions for producing minutes 1.4 describe the responsibilities of the minute taker in a meeting 1.5 explain why it is important to maintain confidentiality of meetings, discussions and actions 1.6 explain why it is necessary to record who proposed and seconded suggestions and changes.

Assessment Guidance

Purpose:

- solving or resolving business problems
- sharing information
- decision-making
- developing new systems, ideas, practices or processes

Types:

- formal – board, council, management
- informal – unplanned, last minute

Conventions:

Customary way in which things are done within an organisation

Responsibilities:

- agreeing agenda with chairperson
- record those present and any apologies for absence
- clearly and accurately record what is discussed
- record actions and by whom with timelines

Evidence may be supplied by:

- report
- questions
- professional discussion

Learning outcome

The learner will:

2. Be able to take notes of meetings.

Assessment criteria

The learner can:

2.1 take **accurate** notes of the:

- a. attendance
- b. proceedings
- c. areas of discussion
- d. agreed actions of meetings

2.2 record allocated responsibilities for agreed actions.

Assessment Guidance

Accurate:

- precise
- correct
- true

Evidence may be supplied by:

- product
- witness testimony
- observation

Learning outcome

The learner will:

3. Be able to produce minutes of meetings.

Assessment criteria

The learner can:

- 3.1 transcribe notes accurately into meeting minutes using correct: a. language
- a. **grammar**
 - b. **punctuation**
 - c. sentence structure
- and in the agreed style
- 3.2 include agreed attachments or appendices
- 3.3 obtain approval for the final documents
- 3.4 distribute minutes to the agreed distribution list
- 3.5 maintain the requirements of confidentiality.

Assessment Guidance

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Evidence may be supplied by:

- product
- witness testimony
- observation.

Unit 206 Handle mail

UAN	D/506/1813
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA612 Handle mail.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to handle mail. Upon completion of this unit, learners will be able to deal with both incoming and outgoing mail.

Learning outcome
The learner will: 1. Understand how to deal with mail.
Assessment criteria
The learner can: 1.1 explain how to deal with 'junk' mail 1.2 describe what to do in the event of problems arising when dealing with incoming or outgoing mail 1.3 describe how to operate a franking machine 1.4 explain how to prepare packages for distribution 1.5 state organisational policies and procedures on: a. mail handling b. security c. the use of courier services 1.6 explain the process for reporting suspicious or damaged items in accordance with organisational procedures.

Assessment Guidance

Problems:

- deadlines missed
- appointments missed
- banking of cheques delayed
- security issues, damage

Franking Machine:

- correct amount of postage used
- sufficient credit
- returning machine to minimum amount

Suspicious or damaged items:

- record date and time of receipt
- report to appropriate authority

Evidence may be supplied by:

- report
- questions
- professional discussion

Learning outcome

The learner will:

2. Be able to deal with incoming mail.

Assessment criteria

The learner can:

2.1 sort incoming mail in line with organisational procedures

2.2 distribute incoming mail and packages to the right people according to the agreed schedule

2.3 deal with incorrectly addressed and '**junk**' mail in accordance with organisational procedures.

Assessment Guidance

Junk mail:

- throw away mail
- widely distributed mail
- unwanted

Evidence may be supplied by:

- observation
- case study/reflective account
- witness testimony

Learning outcome

The learner will:
3. Be able to deal with outgoing mail.

Assessment criteria

The learner can:
3.1 organise the collection of outgoing mail and packages on time
3.2 identify the best option for dispatching mail according to the:
 a. required degree of urgency
 b. size
 c. value of the item
3.3 dispatch outgoing mail on time.

Assessment Guidance**Evidence may be supplied by:**

- observation
- case study/reflective account
- witness testimony.

Unit 207

Provide reception services

UAN:	H/506/1814
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none">• CFABAC312 Provide reception services.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to provide reception services. Upon completion of this unit, learners will be able to provide reception services.

Learning outcome
The learner will: 1. Understand reception services.
Assessment criteria
The learner can: 1.1 explain the receptionist's role in representing an organisation 1.2 explain an organisation's structure and lines of communication 1.3 describe an organisation's standards of presentation 1.4 explain the: a. health b. safety c. security implications of visitors to a building 1.5 explain how to deal with challenging people .

Assessment Guidance

Receptionist's role:

- security
- first impression of organisation
- deal with/greet visitors
- answer the telephone/transfer calls
- data input
- receive mail/packages

Organisation's structure:

- line of command
- communication channels
- departmental areas

Presentation:

- dress code

Challenging people:

- rude
- angry
- confused/upset
- demanding

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to provide a reception service.

Assessment criteria

The learner can:

- 2.1 welcome visitors in accordance with organisational standards
- 2.2 direct visitors to the person they are visiting in accordance with organisational standards
- 2.3 record visitors' arrivals and departures in accordance with organisational procedures
- 2.4 provide advice and accurate information within organisational guidelines on confidentiality
- 2.5 keep the reception area tidy and materials up-to-date
- 2.6 answer and deal with telephone calls within organisational standards
- 2.7 adhere to organisational procedures on:
 - a. entry
 - b. security
 - c. health
 - d. safety.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none">• observation• case study/reflective account• witness testimony.

Unit 208 Prepare text from notes using touch typing

UAN:	K/506/1815
Level:	2
Credit value:	4
GLH:	26
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA213a Prepare text from notes using touch typing • CFABAA213b Prepare text from notes using touch typing (40 wpm) • CFABAA213c notes using touch typing (60 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to prepare text from notes using touch typing. Upon completion of this unit, learners will be able to produce text using touch typing.

Learning outcome
The learner will: 1. Understand how to create text from notes.
Assessment criteria
The learner can: 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe the problems that may occur in transcribing notes written by others 1.3 explain the consequences of: <ul style="list-style-type: none"> a. incorrect spelling b. incorrect punctuation c. incorrect grammar d. incorrect sentence structure e. inaccurate content 1.4 explain how technology features can help to: <ul style="list-style-type: none"> a. create b. format c. check the accuracy of text 1.5 describe ways of checking produced texts for accuracy and correctness 1.6 describe organisational procedures for the: <ul style="list-style-type: none"> a. storage b. security c. confidentiality of information.

Assessment Guidance
Problems: <ul style="list-style-type: none"> • illegible handwriting • technical terminology • combination of numerical/statistical data as well as text
Spelling: Examples below demonstrate how a similar word has a different meaning: <ul style="list-style-type: none"> • accept; except • advise; advice • personnel; personal • as well as words which are often spelt incorrectly eg Accommodation - accomodation
Punctuation: <ul style="list-style-type: none"> • full stops (.) • commas (,) • apostrophes (')
Grammar: <ul style="list-style-type: none"> • nouns - name of person/place

- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Technology features:

- spell check
- grammar check

Check the accuracy:

- input errors
- errors in source material
- amendments to content

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to produce text using touch typing.

Assessment criteria

The learner can:

2.1 agree the purpose, **format** and deadlines for texts

2.2 touch type texts at the speed and level of accuracy required by the organisation

2.3 check that the text is accurate and the meaning is clear and correct

2.4 store texts and original notes safely and securely following organisational procedures

2.5 present texts in the required formats and within the agreed timescales.

Assessment Guidance

The notes used for this unit can be from your own or others. Also your organisation will specify the speed you should be aiming for – 20, 30 or 40 words per minute.

Format:

- layout
- arrangement
- structure

Evidence may be supplied by:

- product
- questions
- professional discussion
- observation.

Unit 209 Prepare text from shorthand

UAN	M/506/1816
Level:	2
Credit value:	6
GLH:	46
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAD311 Prepare text from shorthand • CFABAD311a Prepare text from shorthand (60 wpm) • CFABAD311b Prepare text from shorthand (80 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to prepare text from shorthand. Upon completion of this unit, learners will be able to use shorthand to prepare text.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Understand how to use shorthand to create text.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe techniques that may be used when taking shorthand notes 1.3 explain the consequences of: <ol style="list-style-type: none"> a. incorrect spelling b. incorrect punctuation c. incorrect grammar d. incorrect sentence structure e. inaccurate content 1.4 explain how technology features can help to: <ol style="list-style-type: none"> a. create

- b. format
 - c. **check the accuracy** of text
- 1.5 describe ways of checking produced texts for accuracy and correctness
- 1.6 describe organisational procedures for the:
- a. storage
 - b. security
 - c. confidentiality of information.

Assessment Guidance

Techniques:

Spelling out of actual names; towns, cities, people.

Spelling:

- accept; except
- advise; advice
- personnel; personal
- as well as words which are often spelt incorrectly:
accommodation - accomodation

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Technology features:

- spell check
- grammar check

Check the accuracy:

- input errors
- errors in source material
- amendments to content

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to use shorthand to prepare text.

Assessment criteria

The learner can:

2.1 agree the:

- a. purpose
- b. **format**
- c. deadlines for texts

2.2 take dictation using shorthand at the speed required by the organisation

2.3 input and format text from shorthand notes

2.4 check that text is accurate and the meaning is clear and correct

2.5 store texts and original notes safely and securely following organisational procedures

2.6 present texts in the required formats and within the agreed timescales.

Assessment Guidance

Your organisation will specify the speed you will be expected to achieve; this could be 20, 30 or 40 words per minute.

Format:

- layout
- arrangement
- structure

Evidence may be supplied by:

- product
- questions
- professional discussion
- observation.

Unit 210 Prepare text from recorded audio instruction

UAN	T/506/1817
Level:	2
Credit value:	4
GLH:	15
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAD312 Prepare text from recorded audio instruction • CFABAD312a Prepare text from recorded audio instruction (40 wpm) • CFABAD312b Prepare text from recorded audio instruction (60 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to prepare text from recorded audio instruction. Upon completion of this unit, learners will be able to prepare text from recorded notes.

Learning outcome
The learner will: 1. Understand the preparation of text from recorded notes.
Assessment criteria
The learner can: 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe the main features of the different types of technology that can be used for playing back recordings 1.3 explain how different speaking styles of those giving dictation can affect outputs 1.4 explain the consequences of: a. incorrect spelling b. incorrect punctuation c. incorrect grammar d. incorrect sentence structure e. inaccurate content 1.5 describe ways of checking produced texts for accuracy and correctness 1.6 describe organisational procedures for the: a. storage b. security c. confidentiality of information.

Assessment Guidance
Technology: <ul style="list-style-type: none"> • dvd • mp3 player • cassette • micro-cassette • headset • foot pedal
Speaking styles: <ul style="list-style-type: none"> • someone with an accent • someone with a speech impediment • someone who speaks too quickly
Spelling: Examples below demonstrate how a similar word has a different meaning: <ul style="list-style-type: none"> • accept; except • advise; advice • personnel; personal • as well as words which are often spelt incorrectly: accommodation - accomodation
Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Accuracy: Check for:

- input errors
- errors in source material
- amendments to content
- technology - spell check/grammar check

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to prepare text from recorded notes.

Assessment criteria

The learner can:

2.1 agree the:

- purpose
- format
- deadlines for texts

2.2 input and **format** text from audio recording

2.3 check that text is accurate and the meaning is clear and correct

2.4 store texts and original recordings safely and securely following organisational procedures

2.5 present texts in the required formats and within the agreed timescales.

Assessment Guidance

Your organisation will specify the speed you will be expected to achieve; this could be 20, 30 or 40 words per minute.

Format:

- layout
- arrangement
- structure

Evidence may be supplied by:

- product
- questions
- professional discussion
- observation.

Unit 211 Understand the use of research in business

UAN:	A/506/1818
Level:	2
Credit value:	6
GLH:	40
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD323 Research information
Assessment requirements specified by a sector or regulatory body:	N/A
Aim:	This unit aims to develop knowledge and understanding regarding the use of research in business. Upon completion of this unit, learners will have an understanding of the research process and will also understand how research can be used in business.

Learning outcome
The learner will: 1. Understand the research process.
Assessment criteria
The learner can: 1.1 describe the main stages in the research process 1.2 explain the importance of scoping research and setting the research objectives 1.3 explain the importance of identifying the limitations of research methods 1.4 explain the difference between primary and secondary research 1.5 describe the difference between quantitative and qualitative research methods 1.6 describe the advantages and disadvantages of different research methods 1.7 describe the use of different analytical techniques in the research process 1.8 explain the importance of validity and reliability in the research process.

<p>Range</p>
<p>Main stages</p> <ul style="list-style-type: none"> • research brief • methodology/design • data collection • data analysis <p>Scoping: Full range and possibilities of the research.</p> <p>Research objectives:</p> <ul style="list-style-type: none"> • agree purpose • formatted in a specific way • report to conform to 'house style' • agree timelines • meet the needs of the intended audience <p>Primary: Original research, not drawn from existing data eg data collected by the user themselves for a specific purpose.</p> <p>Secondary: Drawing from existing research data eg where the data is collected by someone else for another purpose but being used by the user here for some other purpose – probably desk based research.</p> <p>Quantitative: Uses statistical analysis drawn from substantial number of participants, measurable.</p> <p>Qualitative: Used to explore less easily defined objectives, such as opinions.</p>
<p>Learning outcome</p>
<p>The learner will:</p> <p>2. Understand how to use research in business.</p>
<p>Assessment criteria</p>
<p>The learner can:</p> <p>2.1 outline the limitations of applying research outcomes</p> <p>2.2 explain why and how to use sources of current and archived business information</p> <p>2.3 explain how to validate research information</p> <p>2.4 describe the purpose and applications of research in business</p> <p>2.5 describe organisational conventions and formats for presenting research reports</p> <p>2.6 explain the organisational policy for acknowledging sources of information</p> <p>2.7 explain ways in which ethics can affect the conduct and use of research.</p>

Range**Conventions:**

The way your organisation does things eg 'house style' – use of fonts, size, style etc.

Ethics:

- morals
- principles
- beliefs.

Unit 212 Archive information

UAN	T/506/1865
Level:	2
Credit value:	3
GLH:	14
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAD334 Provide archive services.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to archive information. Upon completion of this unit, learners will be able to archive information.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Understand archiving requirements.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 describe different ways of archiving information 1.2 describe how to retrieve archived information 1.2 describe organisational procedures for: <ol style="list-style-type: none"> a. archiving b. retrieving c. deleting information 1.3 explain the importance of document retention policies to organisations' 1.4 describe the security and access requirements of offsite archives.

Assessment Guidance

Ways of archiving:

- manual paper-based system
- electronic based system

Information:

- physical text eg letter, fax
- visual eg photograph
- audio eg tape recording
- digital eg e-mail

Procedures:

Records should:

- be titled
- identify the creator
- have expiry date
- retention time limit clearly stated
- have agreed level of access
- clearly state disposal instructions

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to archive information.

Assessment criteria

The learner can:

2.1 confirm the information to be archived

2.2 identify the retention period post-archiving

2.3 archive information within the agreed timescale

2.4 keep archive records up-to-date and indexed

2.5 report **problems** to the right person

2.6 adhere to organisational:

a. policies and procedures

b. legal and ethical

c. requirements when archiving information.

Assessment Guidance

Problems:

- design of the system
- poor administration of the system
- maintenance of the system

Evidence may be supplied by:

- product
- observation
- questioning
- witness testimony
- organisation policies and procedures.

Unit 213 Maintain and issue stationery and supplies

UAN	Y/506/2295
Level:	2
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAF141 Maintain and issue stock items.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to maintain and issue stationery and supplies. Upon completion of this unit, learners will be able to maintain and issue stocks of stationery and supplies.

Learning outcome
The learner will: 1. Understand the maintenance of stationery and supplies.
Assessment criteria
The learner can: 1.1 describe organisational policies, procedures and levels of authority in maintaining supplies 1.2 explain how to carry out a stock check of stationery 1.3 describe the types of problems that may occur with deliveries and stock items 1.4 explain how to deal with problems that occur with deliveries and stock items 1.5 explain the factors to take into account when ordering stationery 1.6 explain the benefits and limitations of different potential suppliers, against organisational requirements 1.7 explain how to calculate quantities of stationery and supplies to be ordered 1.8 describe how to dispose of or recycle waste.

Assessment Guidance

Stock check:

To confirm individual items are in stock through carrying out stock checks eg physical count, records.

Problems:

- number being delivered does not match that ordered
- late delivery
- item no longer available

Factors:

- price
- availability
- delivery date(s)
- discount on bulk ordering
- choice
- one supplier or two

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to maintain stocks of stationery and supplies.

Assessment criteria

The learner can:

2.1 maintain stocks of stationery and supplies at the required levels

2.2 maintain the requirements of storage and security

2.3 carry out **stock checks** in accordance with organisational policies and procedures

2.4 chase up late or incorrect orders with suppliers.

Assessment Guidance

Stock checks:

- correct volume of stock held

Evidence may be supplied by:

- product
- reflective account
- observation
- witness testimony
- questioning

Learning outcome

The learner will:

3. Be able to issue stock of stationery and supplies.

Assessment criteria

The learner can:

3.1 issue stationery and supplies in accordance with organisational requirements

3.2 maintain up-to-date records of stock:

- a. issued
- b. received
- c. in storage

3.3 deal with unwanted or damaged stationery and supplies safely

3.4 recommend ways in which the system for receiving and issuing stock could be improved.

Assessment Guidance**Evidence may be supplied by:**

- product
- observation
- reflective account
- witness testimony
- questioning.

Unit 214 Use and maintain office equipment

UAN	J/506/1868
Level:	2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA231 Use office equipment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to use and maintain office equipment. Upon completion of this unit, learners will be able to use and maintain office equipment.

Learning outcome
The learner will: 1. Understand how to use office equipment.
Assessment criteria
The learner can: 1.1 describe organisational: <ul style="list-style-type: none"> a. policies b. procedures c. levels of authority in maintaining office equipment 1.2 describe how to use different types of office equipment 1.3 explain the reasons for following manufacturer's and organisational instructions when operating equipment 1.4 describe the types of equipment faults likely to be experienced and the correct way of dealing with these.

Assessment Guidance

Office equipment:

- personal
- shared
- specialised

Examples of the above:

- printers/photocopiers
- scanners
- digital cameras
- speakers/earphones
- memory sticks
- binding machines
- fax machines
- shredders
- calculators
- telephones
- security systems
- franking machines
- computers/laptops
- projectors

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to use and maintain office equipment.

Assessment criteria

The learner can:

- 2.1 use the equipment that is appropriate to the task in accordance with the manufacturer's instructions
- 2.2 follow organisational procedures to keep waste to a minimum
- 2.3 maintain the equipment to the standard specified by the organisation or the manufacturer
- 2.4 make sure that equipment conforms with health and safety requirements
- 2.5 report problems that cannot be resolved to the right person.

Assessment Guidance

Evidence may be supplied by:

- product
- questioning
- professional discussion
- observation.

Unit 215 Contribute to the organisation of an event

UAN	L/506/1869
Level:	2
Credit value:	3
GLH:	23
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA311 Support the organisation and co-ordination of events.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to contribute to the organisation of an event. Upon completion of this unit, learners will be able to carry out pre-event actions, set up an event and then carry out post-event actions.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Understand event organisation.
Assessment criteria

The learner can:

1.1 explain the:

- a. roles
- b. responsibilities
- c. accountabilities

of individuals involved in the event

1.2 explain the purpose and features of different **types of events**

1.3 describe the type of **resources** needed for different types of events

1.4 describe the different **needs attendees** may have and how to meet these

1.5 explain the requirements of:

- a. health
- b. safety
- c. security when organising events

1.6 describe the types of **problems** that may occur during events and how to deal with them.

Assessment Guidance

Types of Events:

eg

- Annual General Meeting (AGM)
- a trade show
- a training conference
- an academic conference
- a team building event
- an awards ceremony
- a seminar
- a wedding

Resources:

These will depend on the type of event, choose at least two from the list above and detail what resources would be required for each one.

Needs of attendees may include:

- overnight accommodation
- car parking permits
- special dietary requirements
- disabled access to venue

Problems: Eg

- equipment breakdown
- speaker is late
- refreshments late
- power cut

Evidence may be supplied by:

- report
- professional discussion
-

- questioning

Types of Events:

eg

- Annual General Meeting (AGM)
- a trade show
- a training conference
- an academic conference
- a team building event
- an awards ceremony
- a seminar
- a wedding

Resources:

These will depend on the type of event, choose at least two from the list above and detail what resources would be required for each one.

Needs of attendees may include:

- overnight accommodation
- car parking permits
- special dietary requirements
- disabled access to venue

Problems: Eg

- equipment breakdown
- speaker is late
- refreshments late
- power cut

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome

The learner will:

2. Be able to carry out pre-event actions.

Assessment criteria

The learner can:

- 2.1 identify venue requirements for an event
- 2.2 obtain resources within the agreed timescales
- 2.3 distribute pre-event documentation to delegates in accordance with the event plan
- 2.4 co-ordinate attendee responses within the agreed timescale
- 2.5 identify any special requirements of event attendees.

Assessment Guidance**Evidence may be supplied by:**

- product
- witness testimony
- professional discussion
- questioning
- observation

Learning outcome

The learner will:

3. Be able to set up an event.

Assessment criteria

The learner can:

- 3.1 set up layout and resources in accordance with the event plan
- 3.2 confirm that all identified resources are in place and meet requirements
- 3.3 behave in a way that maintains organisational values and standards.

Assessment Guidance**Evidence may be supplied by:**

- observation
- product
- witness testimony
- questioning

Learning outcome

The learner will:

4. Be able to carry out post-event actions.

Assessment criteria

The learner can:

- 4.1 ensure the venue is restored to the required conditions in accordance with the terms of the contract
- 4.2 carry out follow-up actions in accordance with the event plan and agreements made at the event.

Assessment Guidance**Evidence may be supplied by:**

- observation
- product
- professional discussion
- witness testimony.

Unit 216 Organise business travel or accommodation

UAN	D/506/1875
Level:	2
Credit value:	4
GLH:	23
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAA322 Organise business travel or accommodation.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to organise business travel or accommodation. Upon completion of this unit, learners will be able to research business travel or accommodation options for others, and then use the outcomes of that research to make business or travel arrangements for others.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> Understand the organisation of business travel or accommodation for others.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 explain any budgetary or policy constraints relating to business travel or accommodation 1.2 describe financial arrangements relating to business travel or accommodation 1.3 explain how to make arrangements for visas and related foreign travel documentation 1.4 describe the procedures for obtaining or exchanging foreign currency.

Assessment Guidance

Budgetary or policy constraints:

eg

- threshold cost of hotels
- maximum allowance for meals
- standard class rail and air fare only
- use of specific travel agent

Financial arrangements:

- appropriate authorisation
- receipts must accompany expenses claims
- company credit card
- travel account

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome

The learner will:

2. Be able to research business travel or accommodation options for others.

Assessment criteria

The learner can:

- 2.1 identify different suppliers that are capable of delivering the services required within budget
- 2.2 recommend travel or accommodation arrangements that best meet the requirements
- 2.3 recommend suppliers of travel or accommodation that best meet the requirements.

Assessment Guidance

Evidence may be supplied by:

- report
- professional discussion
- questioning
- observation

Learning outcome

The learner will:

3. Be able to make business travel or accommodation arrangements for others.

Assessment criteria

The learner can:

- 3.1 confirm the **requirements** for travel or accommodation
- 3.2 agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
- 3.3 prepare and issue **itinerary**/schedule documentation that reflect agreed arrangements accurately
- 3.4 obtain travel or accommodation documentation within the required timescale
- 3.5 confirm the acceptability of payments to be made within the limits of their own authority
- 3.6 keep up-to-date records of travel or accommodation arrangements and agreed commitments
- 3.7 adhere to:
 - a. organisational policies and procedures
 - b. legal and ethical requirements

when making business travel or accommodation arrangements for others.

Assessment Guidance**Requirements:**

- budget
- when/who/where/what
- group or individual
- special requirements

Itinerary:

- programme of events
- timetable, plan

Evidence may be supplied by:

- product
- observation
- witness testimony
- organisational policies and procedures.

Unit 217 Provide administrative support for meetings

UAN	H/506/1876
Level:	2
Credit value:	4
GLH:	28
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA411 Support the organisation of meetings • CFABAA412 Plan and organise meetings.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to provide administrative support for meetings. Upon completion of this unit, learners will be able to make administrative preparations for meetings and also support the administration of meetings.

Learning outcome

The learner will:

1. Understand the administration of meetings.

Assessment criteria

The learner can:

- 1.1 describe the purpose of the **meeting** and who needs to attend
- 1.2 explain why it is important to have a **minimum number** of attendees for a meeting
- 1.3 explain ways to achieve maximum attendance at meetings
- 1.4 explain the:
 - a. access
 - b. health
 - c. safety
 - d. security requirements relating to meetings
- 1.4 describe how to set up the **resources** needed for a meeting
- 1.5 explain the responsibilities of the meeting chair and meeting secretary
- 1.6 explain the difference between formal and informal meetings
- 1.7 explain the legal implications of formal meetings.

Assessment Guidance

Meetings:

- informal
- formal
- annual general meeting (agm)
- board meeting
- committee meeting
- departmental meeting
- virtual

Minimum number required for a meeting to take place is known as Quorum.

Resources: eg

- laptop
- multi-media projector
- whiteboard
- flip chart/easel
- pencils
- paper
- documents

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome
The learner will: 2. Be able to make administrative preparations for meetings.
Assessment criteria
The learner can: 2.1 book meeting: a. venue b. resources c. facilities in accordance with the brief 2.2 collate documents needed for a meeting 2.3 distribute meeting: a. invitations b. documents c. other meeting-related requirements within the timescale 2.4 confirm meeting attendees and any special requirements .

Assessment Guidance
Special requirement: eg <ul style="list-style-type: none"> • disabled access • dietary requirements • larger print documents Evidence may be supplied by: <ul style="list-style-type: none"> • product • observation • questioning

Learning outcome
The learner will: 3. Be able to support the administration of meetings.
Assessment criteria
The learner can: 3.1 take action to ensure that the equipment allocated for use at a meeting functions correctly 3.2 provide support to meetings in accordance with requests 3.3 ensure the venue is restored to the required conditions after the meeting 3.4 distribute meeting records promptly to the agreed distribution list 3.5 carry out any follow-up actions in accordance with the brief.

Assessment Guidance**Evidence may be supplied by:**

- product
- witness testimony
- professional discussion
- questioning
- observation.

Unit 218 Administer human resource records

UAN	T/506/1879
Level:	2
Credit value:	3
GLH:	28
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAB151 Administer human resource records.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to administer human resource records. Upon completion of this unit, learners will be able to administer human resource (HR) information.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> Understand the administration of Human Resource (HR) records.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 explain what HR-related information needs to be kept and why 1.2 explain the relationship of HR to other parts of an organisation 1.3 describe the impact of other organisations on HR activities 1.4 describe the features and uses of organisational systems for managing human resource information 1.5 explain the requirements of: <ol style="list-style-type: none"> confidentiality data protection system security 1.6 describe the information to be provided for different management reports 1.7 explain the limits of their own authority in administering HR records 1.8 explain the implications of not keeping HR records up-to-date 1.9 explain the actions to be taken in the event of problems arising or incomplete or inaccurate data.

Assessment Guidance

HR-related information:

eg

- performance appraisals
- job description
- payroll details
- holiday entitlement
- training and development needs national insurance, tax code etc.
- medical notifications

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome

The learner will:

2. Be able to administer HR information.

Assessment criteria

The learner can:

2.1 keep HR records up-to-date

2.2 process data in accordance with organisational procedures

2.3 provide information within the limits of confidentiality 2.4

adhere to:

- a. organisational policies and procedures
- b. legal and ethical requirements.

Assessment Guidance

Evidence may be supplied by:

- product (not confidential)
- observation
- witness testimony
- professional discussion
- questioning.

Unit 219 Administer the recruitment and selection process

UAN	A/506/1883
Level:	2
Credit value:	3
GLH:	25
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • BAB152 Administer the recruitment and selection process.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to administer the recruitment and selection process. Upon completion of this unit, learners will be able to administer the recruitment and selection process.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> 1. Understand the recruitment and selection process.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> 1.1 explain the different administrative requirements of internal and external recruitment 1.2 describe the uses of a job description and a person specification 1.3 explain the administrative requirements of different methods of selection 1.4 explain the requirements of different pre-employment checks to be carried out 1.5 explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process 1.6 explain the requirements of: <ol style="list-style-type: none"> a. confidentiality b. data protection

c. system security.

Assessment Guidance

Job description:

Defines roles and responsibilities.

Person specification:

Lists skills and experience required.

Pre-employment check:

eg

- Criminal Reference Checks (CRC)
- reference check
- valid driving licence

Evidence may be supplied by:

- report
- professional discussion
- questionings

Learning outcome

The learner will:

2. Be able to administer the recruitment process.

Assessment criteria

The learner can:

2.1 check that the job or role details are correct and are in accordance with the brief

2.2 place job advertisements in the agreed **media** in accordance with the timescales

2.3 record applicant responses within the timescale

2.4 provide requested information to applicants in accordance with organisational policies and procedures

2.5 adhere to:

- a. organisational policies and procedures
- b. legal and ethical requirements.

Assessment Guidance

Media:

eg

- national newspapers
- local newspapers
- intranet
- media sites as appropriate (internet)
- professional journals

Evidence may be supplied by:

- product
- observation
- witness testimony
- professional discussion
- questioning

Learning outcome

The learner will:

3. Be able to administer the selection process.

Assessment criteria

The learner can:

3.1 invite shortlisted applicants to participate in the selection process in accordance with organisational procedures

3.2 co-ordinate selection arrangements in accordance with the brief

3.3 carry out agreed pre-employment checks within the agreed timescale

3.4 inform applicants of the outcome of their application in accordance with organisational policies and procedures

3.5 keep selection records up-to-date.

Assessment Guidance

Evidence may be supplied by:

- product
- observation
- witness testimony
- professional discussion
- questioning.

Unit 220 Administer parking dispensations

UAN	R/506/1887
Level:	2
Credit value:	3
GLH:	25
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFASPA1 Administer parking permits, suspensions and dispensations.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to administer parking dispensations. Upon completion of this unit, learners will be able to process applications for parking dispensations and issue parking dispensations.

Learning outcome
<p>The learner will:</p> <ol style="list-style-type: none"> Understand the administration of parking dispensations.
Assessment criteria
<p>The learner can:</p> <ol style="list-style-type: none"> explain the scope and limits of their own responsibilities and authority in issuing parking dispensations describe the legal and regulatory requirements relating to parking dispensations describe the parking dispensation eligibility criteria and checks describe organisational security and anti-fraud policies, procedures and processes describe the features of software to manage the issues of: <ol style="list-style-type: none"> permits season tickets suspensions dispensations or waivers

d. blue badges
1.6 explain where to go for help when dealing with parking dispensations.

Assessment Guidance

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome

The learner will:

2. Be able to process applications for parking dispensations.

Assessment criteria

The learner can:

- 2.1 advise customers of the eligibility criteria for parking dispensations
- 2.2 determine whether customers are eligible by matching the case to the criteria
- 2.3 clarify any areas of doubt or confusion with customers
- 2.4 carry out relevant checks in accordance with organisational procedures and legislative procedures
- 2.5 record the reasons for the decision as to whether or not to grant parking dispensations
- 2.6 maintain the requirements of confidentiality and data protection.

Assessment Guidance

Evidence may be supplied by:

- product
- observation
- witness testimony
- professional discussion
- questioning

Learning outcome

The learner will:

3. Be able to issue parking dispensations.

Assessment criteria

The learner can:

- 3.1 communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures
- 3.2 process payments and refunds in accordance with organisational procedures
- 3.3 keep records up-to-date
- 3.4 adhere to:

- a. organisational policies and procedures
- b. legal and ethical requirements.

Assessment Guidance

Evidence may be supplied by:

- product
- observation
- witness testimony
- professional discussion
- questioning.

Unit 221 Administer finance

UAN	R/506/1890
Level:	2
Credit value:	4
GLH:	21
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to administer finance. Upon completion of this unit, learners will understand finance for administrators and will be able to administer finance.

Learning outcome
The learner will: 1. Understand finance for administrators.
Assessment criteria
The learner can: 1.1 describe organisational hierarchy and levels of authority for financial transactions 1.2 explain organisational systems for: a. sales invoicing b. purchasing c. payments d. receipts 1.3 describe the use of a: a. purchase order b. invoice c. receipts d. expenses .

Assessment Guidance**Organisational hierarchy:**

- head of finance
- section heads
- finance administrators

Check own organisation to see if any or all of the above apply.

Purchase order:

Agreement between purchaser and supplier.

Invoice:

Request for payment.

Receipts:

Acknowledgment of purchase/payment.

Expenses:

Everyday expenditure.

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome

The learner will:

2. Be able to administer finance.

Assessment criteria

The learner can:

- 2.1 record income and expenditure in accordance with organisational policies and procedures
- 2.2 process purchase orders, invoices or expenses in accordance with organisational policies and procedures
- 2.3 process outgoing payments to the correct recipient
- 2.4 accept or allocate incoming payments in accordance with organisational policies.

Assessment Guidance**Evidence may be supplied by:**

- product
- observation
- witness testimony
- questioning.

Unit 222 **Communication in a business environment**

UAN	H/506/1893
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA613 Understand how to communicate in a business environment • CFABAA614 Prepare to communicate in a business environment • CFABAA615 Communicate in a business environment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to communicate in a business environment. Upon completion of this unit, learners will be able to produce written business communications and will be able to communicate verbally in business environments.

Learning outcome
The learner will: 1. Understand the requirements of written and verbal business communication.
Assessment criteria
The learner can: 1.1 explain why different communication methods are used in the business environment 1.2 describe the communication requirements of different audiences 1.3 explain the importance of using correct: <ul style="list-style-type: none"> a. grammar b. sentence structure c. punctuation d. spelling e. conventions in business communications 1.4 explain the importance of using appropriate body language and tone of voice when communicating verbally.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to produce written business communications.
Assessment criteria
The learner can: 2.1 identify the: <ul style="list-style-type: none"> a. nature b. purpose c. audience d. use <p style="padding-left: 40px;">of the information to be communicated</p> 2.2 use communication channels that are appropriate to the information to be communicated and the audience 2.3 present information in the format that meets the brief 2.4 adhere to agreed business communication conventions and degree of formality of expression when producing documents 2.5 produce business communications that are: <ul style="list-style-type: none"> a. clear b. accurate c. correct 2.6 meet agreed deadlines in communicating with others.

Assessment Guidance**Evidence may be supplied by:**

- product
- observation
- witness testimony
- professional discussion
- questioning

Learning outcome

The learner will:

3. Be able to communicate verbally in business environments.

Assessment criteria

The learner can:

3.1 identify the:

- a. nature
- b. purpose
- c. recipient/s
- d. intended use

of the information to be communicated

3.2 use language that is appropriate for the recipient's needs

3.3 use body language and tone of voice to reinforce messages

3.4 identify the meaning and implications of information that is communicated verbally

3.5 confirm that a recipient has understood correctly what has been communicated

3.6 respond in a way that is appropriate to the situation and in accordance with organisational policies and standards.

Assessment Guidance**Evidence may be supplied by:**

- product
- observation
- witness testimony
- professional discussion
- questioning.

Unit 223 Buddy a colleague to develop their skills

UAN	M/506/1895
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSD5249 Buddy a colleague to develop their customer service skills.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to buddy a colleague to develop their skills. Upon completion of this unit, learners will be able to develop a plan to buddy a colleague and then put that plan into action by supporting a buddy colleague in carrying out work activities.

The learner will:

1. Understand how to buddy a colleague.

Assessment criteria

The learner can:

- 1.1 describe what is expected of a **buddy**
- 1.2 explain techniques to give positive **feedback** and constructive criticism
- 1.3 explain **techniques** to establish rapport with a buddy.

Assessment Guidance

Buddy:

The role may be to show a new member of staff where different departments are within the building, how to complete certain regular tasks etc.

Feedback:

eg

- information specific
- issue focused
- based on observations
- 'sandwich' strategy ie positive/negative/positive
- person to person
- timely

Techniques:

- be approachable
- look for things you have in common
- hone your listening skills
- develop active listening
- have empathy
- reflect and clarify
- use open body language

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome
The learner will: 2. Be able to plan to buddy a colleague.
Assessment criteria
The learner can: 2.1 agree which aspects of a colleague's work may benefit from buddying 2.2 confirm organisational requirements for: <ul style="list-style-type: none"> a. standards of behaviour b. presentation c. communication d. performance of a buddy colleague 2.3 agree a schedule of meetings that minimise disruption to business 2.4 agree: <ul style="list-style-type: none"> a. specific b. measurable c. achievable d. realistic e. time-bound (SMART) buddying objectives.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • reflective account

Learning outcome
The learner will: 3. Be able to support a buddy colleague carrying out work activities.
Assessment criteria
The learner can: 3.1 remain unobtrusive while a buddy colleague carries out their work activities 3.2 provide examples of how to carry out tasks correctly 3.3 identify instances of good practice and areas for improvement through observation 3.4 praise a buddy colleague on well completed tasks 3.5 give constructive feedback on ways in which a buddy could improve performance 3.6 offer a buddy hints and tips based on personal experience.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none">• observation• witness testimony• professional discussion• reflective account.

Unit 224/674 Principles of providing administrative services

UAN	J/506/1899
Level:	2
Credit value:	4
GLH:	25
Assessment type:	E-volve or Portfolio of evidence
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA231 Use office equipment • CFABAA322 Organise business travel or accommodation • CFABAA412 Plan and organise meetings • CFABAA431 Use a diary system • CFABAA612 Handle mail • CFABAC121 Deliver, monitor and evaluate customer service to internal and/or external customers.
Assessment requirements specified by a sector or regulatory body:	N/A
Aim	<p>This unit aims to develop knowledge and understanding regarding the provision of providing administrative services. Upon completion of this unit, learners will have developed an understanding of the organisation and administration of meetings, the organisation of travel and accommodation, and the management of diary systems. Learners will also understand how to use office equipment and will understand the use of mail services in a business context.</p>

Learning outcome

The learner will:

1. Understand the organisation and administration of meetings.

Assessment criteria

The learner can:

- 1.1 describe the **features** of different **types of meetings**
- 1.2 outline the different ways of providing administrative support for meetings
- 1.3 explain the steps involved in organising meetings.

Range

Features of different types of meetings:

- regulations, eg frequency, period of notice, validity, voting
- documentation required, eg notice, agenda, notes/minutes, attendance register
- personnel involved, eg chair, treasurer, secretary

Types of meetings:

Formal

- annual general meeting
- extraordinary general meeting
- committees
- board meetings

Informal

- departmental
- team
- briefings
- progress

Learning outcome

The learner will:

2. Understand the organisation of travel and accommodation.

Assessment criteria

The learner can:

- 2.1 describe the features of different types of business **travel** and **accommodation**
- 2.2 explain the purpose of confirming instructions and requirements for business travel and accommodation
- 2.3 explain the purpose of keeping **records** of business travel and accommodation.

Range**Travel:**

- air
- rail
- road
- sea

Accommodation:

- hotels
- serviced apartments

Records:

- booking documents
- receipts

Learning outcome

The learner will:

3. Understand how to manage diary systems.

Assessment criteria

The learner can:

- 3.1 describe the features of hard copy and electronic diary systems
- 3.2 explain the purpose of using diary systems to plan and coordinate activities and resources
- 3.3 describe the types of information needed to manage a diary system
- 3.4 explain the importance of obtaining correct information when making diary entries.

Learning outcome

The learner will:

4. Understand how to use office equipment.

Assessment criteria

The learner can:

- 4.1 describe different **types of office equipment**
- 4.2 explain the uses of different types of office equipment
- 4.3 describe factors to be considered when selecting office equipment to complete tasks
- 4.4 describe how to keep **waste** to a minimum when using office equipment.

Range

Types of office equipment:

- computers
- printers (multi-function and desktop)
- scanners
- photocopiers
- mailroom equipment
- shredders
- laminators and binding machines
- audio equipment.
- telephone/answer systems/fax

Waste:

- consumables (ie ink, stationery)
- time (ie staff, production time)
- energy (ie electricity).

Learning outcome

The learner will:

5. Understand the use of mail services in a business context.

Assessment criteria

The learner can:

5.1 describe the types of **mail services** used in business organisations

5.2 explain the need for different types of mail services

5.3 explain the factors to be considered when selecting mail services

5.4 explain the factors to be taken into account when choosing **postage methods**.

Range

Mail services:

- postal services
- couriers
- overseas
- internal circulation

Postage methods:

- first/second class
- special delivery
- parcel post

Learning outcome
The learner will: 6. Understand customer service in a business environment.
Assessment criteria
The learner can: 6.1 describe different types of customers 6.2 describe the impact of their own behaviour on a customer 6.3 explain the impact of poor customer service .

Range
<p>Types of customers: Internal eg</p> <ul style="list-style-type: none"> • from another part of the same organisation • colleagues <p>External eg</p> <ul style="list-style-type: none"> • individuals • other businesses • suppliers • prospective customers • visitors/callers/trades people <p>Impact of poor customer service:</p> <ul style="list-style-type: none"> • business • reputation • working relationships

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research on the range stated in each of the above learning outcomes.

Candidates will be required to submit a report of a minimum of 2000 words to a maximum of 3500 words, ensuring all of the range in each learning outcome is covered.

Any necessary additional coverage could be generated through professional discussion. Examples of products where appropriate could also be used and cross-referenced into appropriate units.

Unit 225/675 Principles of business document production and information management

UAN	T/506/1901
Level:	2
Credit value:	3
GLH:	21
Assessment type:	E-volve or Portfolio of evidence
Relationship to NOS:	<p>This unit is linked to the Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA211 Produce documents in a business environment • CFABAD111 Support the design and development of information systems • CFABAD121 Support the management and development of an information system.
Assessment requirements specified by a sector or regulatory body:	N/A
Aim	<p>This unit aims to develop knowledge and understanding regarding the principles of business document production and information management. Upon completion of this unit, learners will understand how to prepare and distribute business documents and will also understand how information is managed in business organisations.</p>

Learning outcome
The learner will: 1. Understand how to prepare business documents.
Assessment criteria
The learner can: 1.1 describe different types of business documents that may be produced and the format to be followed for each 1.2 explain the use of different types of Information Communication Technology (ICT) for document production 1.3 explain the reasons for agreeing the: <ul style="list-style-type: none"> a. use b. content c. layout d. quality standards e. deadlines for document production 1.4 explain the importance of document version control and authorisation 1.5 explain how the requirements of: <ul style="list-style-type: none"> a. security b. data protection c. copyright d. intellectual property legislation may affect the production of business documents 1.6 explain how to check the accuracy of business documents.

Range
Business documents: <ul style="list-style-type: none"> • memos • letters • reports • forms • notices • minutes • agendas • email • invoices Format: <ul style="list-style-type: none"> • structure • layout • business conventions • house styles Information communication technology: <ul style="list-style-type: none"> • word processing software

- presentation graphics software
 - spreadsheet software
- desktop publishing

Learning outcome

The learner will:

2. Understand the distribution of business documents.

Assessment criteria

The learner can:

2.1 explain how the requirements of:

- a. security
- b. data protection
- c. copyright
- d. intellectual property legislation

may affect the distribution and storage of business documents

2.2 describe different types of **distribution channels**.

Range

Distribution channels:

- e-mail
- postal
- courier
- by hand
- internal
- external

Learning outcome

The learner will:

3. Understand how information is managed in business organisations.

Assessment criteria

The learner can:

3.1 describe the **types of information** found in business organisations

3.2 explain the need for safe **storage** and efficient retrieval of information

3.3 describe the **features** of different types of systems used for storage and retrieval of information

3.4 describe the **legal requirements** for storing business information.

Range

Types of information:

- customer
- staff
- finance
- products/service
- legal
- operational

Storage:

- paper-based/electronic

Features:

- classification
- method of storage

Legal requirements:

- Freedom of Information Act 2000 (FOIA)
- Data Protection Act
- Statutory retention periods.

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research on the range stated in each of the above learning outcomes.

Candidates will be required to submit a report of a minimum of 2000 words to a maximum of 3500 words, ensuring all of the range in each learning outcome is covered.

Any necessary additional coverage could be generated through professional discussion. Examples of products where appropriate could also be used and cross-referenced into appropriate units.

Unit 226/676 Understand employer organisations

UAN	A/506/1964
Level:	2
Credit value:	4
GLH:	40
Assessment type:	E-volve or Portfolio of evidence
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAF174 Manage work in a business environment.
Assessment requirements specified by a sector or regulatory body:	N/A
Aim	This unit aims to develop knowledge and understanding regarding employer organisations. Upon completion of this unit, learners will have developed an understanding of organisational structures and the organisational environment.

Learning outcome
The learner will: 1. Understand organisational structures.
Assessment criteria
The learner can: 1.1 explain the differences between the: <ul style="list-style-type: none"> a. private sector b. public sector c. voluntary sector 1.2 explain the functions of different organisational structures 1.3 describe the features of different types of legal structures for organisations.

<p>Range</p> <p>Private:</p> <ul style="list-style-type: none"> • sole trader • partnership • public limited company • private limited company • franchise <p>Public:</p> <ul style="list-style-type: none"> • Government departments • local authorities • public corporations <p>Voluntary:</p> <ul style="list-style-type: none"> • not for profit • registered charities • trusts <p>Organisational structures:</p> <ul style="list-style-type: none"> • hierarchy/flat • centralised/de-centralised <p>Features of legal structures:</p> <ul style="list-style-type: none"> • formation • ownership and control • liability • obligation
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<p>Learning outcome</p> <p>The learner will:</p> <p>2. Understand the organisational environment.</p>
<p>Assessment criteria</p> <p>The learner can:</p> <p>2.1 describe the internal and external influences on organisations</p> <p>2.2 explain the use of different models of analysis in understanding the organisational environment</p> <p>2.3 explain why change in the business environment is important.</p>

Range

Internal influences:

- policies
- procedures
- systems
- organisational and team structure
- aims and objectives
- culture

External influences:

- competitors
- market share
- PESTLE factors

Models:

- SWOT analysis
- PESTLE analysis

Change:

- change in market share
- new technologies
- new competitors
- staff/organisational structure
- globalisation
- sustainability.

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research on the range stated in each of the above learning outcomes.

Candidates will be required to submit a report of a minimum of 2000 words to a maximum of 3500 words based on their own organisation. Not all of the range shown in each learning outcome will be relevant to their organisation.

The report must show that candidates have developed an understanding of organisational structures and the organisational environment in relation to the business sector in which their organisation sits.

Candidates must also explain the differences between their sector and the remaining two sectors.

Any necessary additional coverage could be generated through professional discussion.

Unit 227 Employee rights and responsibilities

UAN	L/506/1905
Level:	2
Credit value:	2
GLH:	16
Relationship to NOS:	N/A
Assessment type:	Short Answer Questions (C&G) Assignment or Skills CFA on-line ERR workbook
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. Upon completion of this unit, learners will have developed an understanding of the role of organisations and industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.

Learning outcome

The learner will:

1. Understand the role of organisations and industries.

Assessment criteria

The learner can:

- 1.1 explain the role of their own occupation within an organisation and industry
- 1.2 describe career pathways within their organisation and industry
- 1.3 identify sources of information and advice on an:
 - a. industry
 - b. occupation
 - c. training
 - d. career pathway
- 1.4 describe an organisation's principles of conduct and codes of practice
- 1.5 explain issues of public concern that affect an organisation and industry
- 1.6 describe the:
 - a. types
 - b. roles
 - c. responsibilitiesof representative bodies and their relevance to their own role.

Learning outcome

The learner will:

2. Understand employers' expectations and employees' rights and obligations.

Assessment criteria

The learner can:

- 2.1 describe the employer and employee statutory rights and responsibilities that affect their own role
- 2.2 describe an employer's expectations for employees' standards of:
 - a. personal presentation
 - b. punctuality
 - c. behaviour
- 2.3 describe the procedures and documentation that protect relationships with employees
- 2.4 identify sources of information and advice on employment rights and responsibilities.

Unit 227 Employee rights and responsibilities

Supporting information

Evidence requirements

5528-227 Employee rights and responsibilities must be assessed by one of the versions of the short answer question assignments provided by City & Guilds, available from the City & Guilds website and marked internally by the centre.

Unit 228 Process information about customers

UAN	R/506/2134
Level:	2
Credit value:	3
GLH:	14
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSA6 Process information about customers
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to process customer information. Upon completion of this unit, learners will be able to process customer information.

Learning outcome
The learner will: 1. Understand how to process customer information.
Assessment criteria
The learner can: 1.1 describe the functions of customer information systems 1.2 explain the way in which legislation and regulatory requirements affect the processing of customer information 1.3 explain different responsibilities and levels of authority for processing customer service information 1.4 explain the reliability of sources of customer information 1.5 explain the validity of customer information.

Assessment guidance

Functions: eg

- retain customer information
- manage information
- engage/make contact with customers
- create reports.

Customer information systems:

- bespoke systems
- customer relationship management system (CRM)
- management information system

Legislation and regulatory requirements:

- Data Protection Act
- Principles of Data Protection Act
- Equality Act
- internal policies and procedures

Reliability:

- up to date
- checked and confirmed
- accurate

Validity:

Checking information is authentic/genuine

Evidence may be supplied by:

- professional discussion
- questioning
- reflective accounts

Learning outcome

The learner will:

2. Be able to process customer information.

Assessment criteria

The learner can:

2.1 record information about customers in line with **organisational standards and procedures**

2.2 keep customer information up to date

2.3 respond to requests for customer information from **authorised people** in a timely manner

2.4 retrieve customer information that meets the requirements of the request

2.5 supply customer information in a format appropriate for the recipient

2.6 adhere **to organisational policies and procedures, legal and ethical requirements** when processing customer information.

Assessment guidance

Organisational standards and procedures:

They will be different according to the organisation and will relate to the information to be retained, how it will be collected and used.

Authorised people:

Those within the organisation who have authority to access and/or use the data.

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- handling of data, including collection and usage
- data protection and confidentiality policy

Legal requirements eg

- Data Protection Act
- Equality Act.

Ethical requirements

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- customer records/database*
- organisational policies and procedures, legislative requirements and organisational ethical policies. **

Note: this unit is about processing information about customers. Here the candidate will require to be observed processing information about customers over time. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

** While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 229 Develop customer relationships

UAN	Y/506/2149
Level:	2
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSD1 Develop customer relationships
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to develop customer relationships. Upon completion of this unit, learners will be able to develop relationships with customers.

Learning outcome
The learner will: 1. Understand how to develop customer relationships.
Assessment criteria
The learner can: 1.1 describe the importance of developing relationships with customers 1.2 explain the value of customer loyalty and retention 1.3 explain how customers' expectations may change over time 1.4 explain the use of customer feedback as a means of developing customer relationships 1.5 explain the limits of their own authority to make alternative service offers to customers 1.6 describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 explain the importance of regular communication in the development of both internal and external customer relationships.

Assessment guidance

Customer loyalty and retention:

Customer loyalty is important as it means customers return and are a captive market. It is important to keep/retain customers as it can be cheaper than having to work at finding and winning new customers. If there is a good existing customer base you can use them to sell to, gain feedback from etc.

Expectations:

What the customer thinks they should experience or get.

Customer feedback:

Can be obtained through surveys, questionnaires, forums, social media, comment cards, customer comments.

Alternative service offers:

eg

- discounts
- replacement products
- reduction

Customer Relationship Management systems:

The uses of an effective CRM system are it:

- allows access across operations within an organisation eg it can be accessed by marketing to gain an insight into customer needs, likes etc but can also be accessed by sales to get details on customers to target by looking at past purchases, profitability
- allows greater customer contact and communication through the information held and so can improve the customer service offered by all departments with access. Customers can also freely offer information they want to be held again improving the potential to build the customer relationship
- allows control of sales and marketing by giving more specific information that has been gathered over time
- is used to monitor customers, their behaviour, needs, purchases etc and so aids forecasting of future needs, purchases etc.

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- organisational policies and procedures.*

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Note: while the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Learning outcome

The learner will:

2. Be able to develop relationships with customers.

Assessment criteria

The learner can:

2.1 give help and information that meets or exceeds customers' **expectations**

2.2 identify new ways of helping customers based on their **feedback**

2.3 share feedback from customers with others

2.4 identify **added value** that the organisation could offer customers

2.5 bring to customers' attention products or services that may interest them.

Assessment guidance**Expectations:**

What the customer thinks they should experience or get.

Feedback:

Can be obtained through surveys, questionnaires, forums, social media, comment cards, customer comments.

Added value:

Where the customer receives something they see as adding to the value of the product or service eg the offer of a two year free product guarantee can be seen by the customer as adding value to the product they are buying

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- feedback
- documentation*
- legislation, organisational policies and procedures**.

Note: this unit is about developing customer relationships.

Here the candidate will require to be observed over time developing relationships with customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

****Note:** While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 230 Deliver customer service

UAN	A/506/2130
Level:	2
Credit value:	5
GLH:	27
Relationship to NOS:	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA1 Maintain a positive and customer-friendly attitude • CFACSA2 Behave in a way that gives a good customer service impression • CFACSA4 Give customers a positive impression of yourself and your organisation • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA8 Make customer service personal • CFACSB1 Do your job in a customer friendly way • CFACSB2 Deliver reliable customer service • CFACSF2 Deliver customer service within the rules.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to deliver customer service. Upon completion of this unit, learners will be able to prepare to deal with customers, provide customer service, and support improvements to customer service delivery.

Learning outcome

The learner will:

1. Understand customer service delivery.

Assessment criteria

The learner can:

- 1.1 explain the relationship between customers' **needs** and **expectations** and customer **satisfaction**
- 1.2 describe the **features and benefits** of an organisation's products and/or services
- 1.3 explain the importance of treating customers as individuals
- 1.4 explain the importance of **balancing promises** made to customers with the needs of an organisation
- 1.5 explain when and to whom to escalate problems
- 1.6 describe methods of measuring their own effectiveness in the delivery of customer service.

Assessment guidance**Needs:**

What the customer must have/requires.

Expectations:

What the customer thinks they should experience or get.

Satisfaction

When an organisation meets or surpasses a customer's expectations.

Features and benefits:

Feature – what a product or service does.

Benefit – how the features meet the customer needs.

Balancing promises:

Deciding when the promises can be met by the organisation and when it is not viable for the organisation to do what the customer wants either financially or practically.

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- marketing materials

Learning outcome

The learner will:

2. Understand the relationship between customer service and a brand.

Assessment criteria

The learner can:

2.1 explain the importance of a **brand** to an organisation

2.2 explain how a **brand** affects an organisation's customer **service offer**

2.3 explain the importance of using customer service language that supports a **brand promise**

2.4 identify their own role in ensuring that a **brand promise** is delivered.

Assessment guidance**Brand:**

A brand is the way in which an organisation's products, services are identified.

Service offer:

A service offer is what the organisation says it will offer its customers and is therefore what the customer comes to expect. A service offer covers eg the refund policy, its delivery times and the service it will offer.

Brand promise:

Branding is the way a product or service is recognised and is the promise made by the organisation to its customer. When a customer sees a particular brand they trust it assists them when making buying decisions as they know what to expect. If they do not recognise the brand they will have no clear expectations of the product or service and will almost be taking a risk on any purchase or usage.

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- marketing materials
- brand

Learning outcome

The learner will:

3. Be able to prepare to deal with customers.

Assessment criteria

The learner can:

3.1 keep up to date with an organisation's products and/or services

3.2 prepare **resources** that are necessary to deal with customers before starting work.

Assessment guidance

Resources: eg:

- marketing materials
- manuals*
- documentation*
- schedules/rotas/daily plan
- customer records*
- any monetary requirements.

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- knowledge base content*
- service offer*
- marketing materials
- manuals*
- documentation*
- schedules/rotas/daily plan
- legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Learning outcome

The learner will:

4. Be able to provide customer service.

Assessment criteria

The learner can:

4.1 maintain organisational standards of **presentation and behaviour** when providing customer service

4.2 adapt their own behaviour to meet customers' needs or expectations

4.3 respond to customers' requests in line with **organisational guidelines**

4.4 inform customers of the progress of their requests

4.5 confirm that customers' expectations have been met in line with the service offer

4.6 adhere to **organisational policies and procedures, legal and ethical requirements** when providing customer service.

Assessment guidance**Presentation and behaviour:**

- personal presentation/dress/uniform
- presentation of work area
- attitude
- tone of voice
- body language

Organisational guidelines:

- organisational policies/procedures
- work instructions
- scripts

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- service offer
- handling of customer issues

Legal requirements eg

- Sale of Goods Act (Sale and Supply of Goods to Consumers Regulations)
- Trade Descriptions Act
- Data Protection Act
- Equality Act

Ethical requirements:

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- work instructions/scripts*
- organisational policies and procedures, legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Learning outcome

The learner will:

5. Be able to support improvements to customer service delivery.

Assessment criteria

The learner can:

5.1 identify ways that customer service could be improved for an organisation and individuals

5.2 share information and ideas with colleagues and/or service partners to support the **improvement** of service delivery.

Assessment guidance

Improvements:

The candidate does not need to put improvements in place but make suggestions and then share these ideas and related information.

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- customer feedback.
- organisational policies and procedures, legal requirements and ethical policies**

Note:

This unit is about delivering customer service on a daily basis.

Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

** Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 231

Principles of marketing theory

UAN	D/502/9928
Level:	2
Credit value:	4
GLH:	30
Relationship to NOS:	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</p> <p>Marketing 1.3.3 Establish and understand potential market segments</p> <p>Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</p> <p>Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</p> <p>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 4.1.3 Manage communications for social marketing programmes</p>
Assessment requirements specified by a sector or regulatory body:	<p>This unit is endorsed by the Council for Administration</p>
Aim	<p>This unit concerns understanding how to segment the market, the value of marketing and the principles of socially responsible marketing</p>

Learning outcome
The learner will: 1. Understand how to segment the market.
Assessment criteria
The learner can: 1.1 explain the importance of defining market segments 1.2 describe the difference between market segments and customer classifications 1.3 explain how to cluster customers with similar characteristics 1.4 describe how a range of products may appeal to different market segments 1.5 describe the importance of valid and reliable marketing data to segmenting the market 1.6 explain the strengths and weaknesses of different marketing data collection methods 1.7 describe the use of Customer Relationship Management (CRM) activities and systems.

Range
<p>Market segments:</p> <ul style="list-style-type: none"> • age • gender • religion • culture • income • lifestyle <p>Customer classifications:</p> <ul style="list-style-type: none"> • business customers • leisure customers <p>Data collection methods:</p> <ul style="list-style-type: none"> • primary • secondary

Learning outcome

The learner will:

2. Understand the value of marketing.

Assessment criteria

The learner can:

- 2.1 describe the role of marketing in enhancing the sale of products and/or services
- 2.2 explain the significance of customer loyalty to the achievement of marketing objectives
- 2.3 explain the role of performance indicators and evaluation arrangements
- 2.4 describe the **factors** to be taken into account when assessing the cost and value of marketing activities
- 2.5 explain the significance of brand and reputation to sales performance.

Range**Factors:**

- target audience
- marketing mediums
- timeframes
- budget

Learning outcome

The learner will:

3. Understand the principles of socially responsible marketing.

Assessment criteria

The learner can:

- 3.1 explain the scope and purpose of **socially responsible marketing**
- 3.2 explain the importance of involving **stakeholders** in socially responsible marketing activities
- 3.3 explain how core values are expressed through coherent **branding** and chosen communication methods
- 3.4 explain the requirements of socially responsible marketing campaigns.

Range**Socially responsible marketing:**

Ethical eg smoking, health (sexual health, pregnancy, alcohol), education.

Corporate social responsibility eg diversity, community responsibility, volunteering, mentoring.

Stakeholders:

- internal and external customers
- investors
- client
- shareholders

Branding:

- logo
- campaign name
- key message
- design
- recognition.

Unit 231 **Principles of marketing theory**

Supporting information

Guidance

For assessment criterion 1.4, candidates should cover at least 3 products.

For assessment criterion 1.7, CRM should be relative to an organisation either through work experience or research.

For assessment criterion 3.3, candidates should consider an organisation's core values and/or the core values of a campaign.

Candidates should have knowledge of marketing plans to help achieve this unit.

Unit 232 Principles of digital marketing

UAN	D/502/9931
Level:	2
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 4.3.8 Market to target customers using digital/electronic media Marketing 4.3.9 Communicate using multiple digital marketing channels.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration.
Aim	This unit concerns understanding the role of digital marketing, the use of search engine optimisation (SEO), the requirements of marketing research using the internet, the uses of digital marketing device and messages and how to use digital technology for marketing purposes.

Learning outcome
The learner will: 1. Understand the role of digital marketing.
Assessment criteria
The learner can: 1.1 explain the role of digital marketing within the overall marketing strategy 1.2 explain the strengths and weaknesses of digital marketing 1.3 explain the importance of targeted digital marketing 1.4 describe the sources of data lists for use in targeting customers and potential customers 1.5 explain the legal requirements and implications of digital marketing 1.6 describe the importance of digital data capture systems for digital marketing.

Range

Digital marketing:

- social networking
- online advertising
- mobile platforms
- e-marketing
- search
- websites

Sources:

Data capture eg competitions, membership sign-up, CRM system, customer details.

Legal requirements:

- Equality Act
- Data Protection Act
- Copyright
- Trade Descriptions Act

Learning outcome

The learner will:

2. Understand the use of Search Engine Optimisation (SEO).

Assessment criteria

The learner can:

- 2.1 describe the use of SEO
- 2.2 explain the importance of SEO
- 2.3 explain the advantages and disadvantages of links to other websites.

Learning outcome

The learner will:

3. Understand the requirements of marketing research using the internet.

Assessment criteria

The learner can:

- 3.1 explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
- 3.2 explain the advantages and disadvantages of different **internet data collection sources**
- 3.3 explain the importance of confirming the accuracy of information retrieved from the internet.

Range**Internet data collection sources:**

- pay-per click
- data analytics

Learning outcome

The learner will:

4. Understand the uses of digital marketing devices and messages.

Assessment criteria

The learner can:

- 4.1 describe the potential uses of a Customer Relationship Management (CRM) system
- 4.2 explain the importance of data cleansing
- 4.3 describe the use of digital **marketing devices**
- 4.4 describe the use of digital **response systems**
- 4.5 explain the advantages and disadvantages of different **tracking systems**.

Range**Marketing devices:**

- direct email
- e-flyers
- social networking groups

Response systems:

- questionnaires
- competitions
- promotions
- vouchers

Tracking systems:

- open rates
- click through rates
- conversion rates

Learning outcome

The learner will:

5. Understand how to use digital technology for marketing purposes.

Assessment criteria

The learner can:

5.1 explain how to use a CRM system

5.2 explain how to maintain the currency and accuracy of digital databases

5.3 explain the advantages and disadvantages of different **digital technologies**

5.4 describe the importance of tailoring messages to different **digital media**

5.5 explain the potential for marketing to social networking sites

5.6 explain how to prevent marketing messages being identified as 'spam'.

Range

Digital technologies:

- CRM systems
- search engines
- e-mail
- social networks

Digital media:

- TV
- mobile phones
- computers.

Unit 233 Bespoke software

UAN	F/502/4396
Level:	2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 2 the National Occupational Standards for Health Informatics devised by Skills for Health
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Tech Partnership.
Aim	<p>This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.</p> <p>On completion of this unit a candidate should be able to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others. Bespoke software tools and techniques will be defined as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be nonroutine or unfamiliar • the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multistep; and • the user will take some responsibility for inputting, manipulating and outputting the information.

Learning outcome

The learner will:

1. Input and combine information using bespoke applications.

Assessment criteria

The learner can:

- 1.1 input relevant information accurately so that it is ready for processing
- 1.2 select and use appropriate techniques to link and combine information of different forms or from different sources within the software
- 1.3 respond appropriately to data entry error messages.

Learning outcome

The learner will:

2. Use appropriate structures to organise and retrieve information efficiently.

Assessment criteria

The learner can:

- 2.1 describe what functions to apply to structure and layout information effectively
- 2.2 select and use appropriate structures and/or layouts to organise information
- 2.3 apply local and/or legal guidelines and conventions for the storage and use of data where available.

Learning outcome

The learner will:

3. Use the functions of the software effectively to process and present information.

Assessment criteria

The learner can:

- 3.1 select and use appropriate tools and techniques to edit, process and format information
- 3.2 check information meets needs, using IT tools and making corrections as necessary
- 3.3 select and use appropriate methods to present information.

Unit 233 Bespoke software

Supporting information

Assessment

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine information using bespoke applications

The learner should be able to and understand:

Types of bespoke information:

- Information will vary according to the software for example:
 - text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables.

Inputting information:

- Inputting tools and techniques will vary according to the technology being used for example:
 - interface devices (eg keyboard, mouse, stylus, touch screen)
 - microphone (eg headset, built-in) ○ camera (eg web camera, video camera, mobile phone camera).

Combining information techniques:

- Insert, size, position, wrap, order, group, import data, links and references to external data.

Outcome 2 Use appropriate structures to organise and retrieve information efficiently

The learner should be able to and understand:

Structures and layouts:

- Apply and change existing templates, set up templates for inputting or retrieving information, apply or change existing styles.

Guidelines for the storage and use of data:

- Set by employer or organisation or centre.
- Policies relating to security, backup and data protection.
- Guidelines for data format.
- Compliance, audit and reporting requirements.
- File management will vary according to the application.

Outcome 3 Use the functions of the software effectively to process and present information

The learner should be able to and understand:

Editing, analysis and formatting techniques:

- Techniques will vary according to the software and task, for example:
 - **Editing:** select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch.
 - **Analysis:** design queries, mathematical, logical or statistical functions.
 - **Formatting:** characters, lines, paragraphs, pages, file type.

Check information:

- Checks will vary according to the type of information and software, but could include:
 - spell check, grammar check
 - accuracy of figures
 - labelling and size of images
 - quality of images and sound, volume of sound
 - line, paragraph and page breaks fall appropriately
 - formatting is consistent
 - the use of headings and subheadings aid clarity
 - the placing of images or sound clips.

Presentation methods:

- Methods will vary according to the software and task, for example:
 - on screen display, publishing on a web site, hard copy print out, digital file.
- Organisational house style, branding.

Unit 234 Spreadsheet software

UAN	F/502/4625
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is based on the Level 2 National Occupational Standards for IT users.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the Tech Partnership.
Aim	This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcome
The learner will: 1. Use a spreadsheet to enter, edit and organise numerical and other data.
Assessment criteria
The learner can: 1.1 identify what numerical and other information is needed in the spreadsheet and how it should be structured 1.2 enter and edit numerical and other data accurately 1.3 combine and link data across worksheets 1.4 store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- product
- reflective account

Learning outcome

The learner will:

2. Select and use appropriate formulas and data analysis tools to meet requirements.

Assessment criteria

The learner can:

2.1 identify which tools and techniques to use to analyse and manipulate data to meet requirements

2.2 select and use a range of appropriate functions and formulas to meet calculation requirements

2.3 use a range of tools and techniques to analyse and manipulate data to meet requirements.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- product
- reflective account

Learning outcome

The learner will:

3. Select and use tools and techniques to present and format spreadsheet information.

Assessment criteria

The learner can:

- 3.1 plan how to present and format spreadsheet information effectively to meet needs
- 3.2 select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
- 3.3 select and format an appropriate chart or graph type to display selected information
- 3.4 select and use appropriate page layout to present and print spreadsheet information
- 3.5 check information meets needs, using spreadsheet tools and making corrections as necessary
- 3.6 describe how to find errors in spreadsheet formulas
- 3.7 respond appropriately to any problems with spreadsheets.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- product
- reflective account.

Unit 235 Exploring social media

UAN	F/505/6880
Level:	2
Credit value:	2
GLH:	16

Learning outcome
The learner will: 1. Understand the opportunities and threats associated with using social media.
Assessment criteria
The learner can: 1.1 describe the positive and negative aspects of using social media. 1.2 describe how to minimise risks associated with using social media.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none">• report• professional discussion• questioning• reflective account

Learning outcome
The learner will: 2. Understand the application of social media.
Assessment criteria
The learner can: 2.1 describe how various social media sites may be used by groups, individuals, businesses and organisations. 2.2 demonstrate the use of various social media sites to communicate and upload content including: <ul style="list-style-type: none">a. Facebookb. Bloggingc. Twitterd. YouTube 2.3 describe how businesses and organisations may use social media to promote products and services.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none">• report• professional discussion• questioning• reflective account• product

Unit 236 Processing customers' financial transactions

UAN	F/601/8320
Level:	2
Credit value:	4
GLH:	8
Relationship to NOS:	CP01: Process customers' financial transactions
Aim	This unit may be suitable for learners whose work involves receiving from and/or making payments to customers and monitoring customers' payments. The learner will make sure that the amount and documentation are accurate, that all procedures are carried out in line with the organisation's requirements and that customer payments are made on time.

Learning outcome
The learner will: 1. Be able to deal with customer transactions and documentation.
Assessment criteria
The learner can: 1.1 receive payments from and/or make payments to customers 1.2 confirm that amounts and balances are accurate 1.3 process payments accurately in accordance with the organisation's procedures 1.4 recognise discrepancies in documentation and take appropriate action 1.5 make sure that all documentation, entries and records are accurate and legible.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

2. Be able to comply with all codes, laws and regulatory requirements.

Assessment criteria

The learner can:

- 2.1 follow the organisation's systems, procedures and organisational timescales
- 2.2 explain the organisation's customer service and complaints procedure
- 2.3 act within personal authority limits and recognising when to refer to others
- 2.4 explain the sources of information and advice within the organisation
- 2.5 identify the different methods of receiving financial information
- 2.6 comply with legal requirements, industry regulations, organisational policies and professional codes
- 2.7 explain the organisation's requirements relating to the application of codes, laws and regulatory requirements and their impact on the job role.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account.

Unit 237 Data management software

UAN	J/502/4559
Level:	2
Credit value:	3
GLH:	20
Assessment type:	Portfolio of evidence
Relationship to NOS:	This unit is linked to the Level 2 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim	<p>This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored.</p> <p>On completion of this unit a candidate should be able to select and use intermediate data management software tools and techniques to:</p> <ul style="list-style-type: none"> • enter information into data management systems that is at times non-routine or unfamiliar; • retrieve information using multiple selection criteria; and • produce customised reports from the system. <p>The data management system tools, functions and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be nonroutine or unfamiliar; and <p>the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.</p>

Learning outcome
The learner will: 1. Enter, edit and maintain data records in a data management system.
Assessment criteria
The learner can: 1.1 describe the risks to data security and procedures used for data protection 1.2 enter data accurately into groups of records to meet requirements 1.3 locate and amend data associated with groups of records 1.4 check data records meet needs, using IT tools and making corrections as necessary 1.5 respond appropriately to data entry and other error messages 1.6 apply local and/or legal guidelines for the storage and use of data where available.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • product • reflective account

Learning outcome
The learner will: 2. Retrieve and display data records to meet requirements.
Assessment criteria
The learner can: 2.1 identify what queries and reports need to be run to output the required information 2.2 select and use queries to search for and retrieve information to meet given requirements 2.3 create and view reports to output information from the system to meet given requirements.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none">• observation• witness testimony• professional discussion• product• reflective account

Unit 237 Data management software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Enter, edit and maintain data records in a data management system

The learner should be able to and understand:

Benefits of data management system:

- Accessible, reliable, rapid access.
- Shared view, up-to-date, accurate, secure.
- Simplifies data handling.

Enter data:

- Use of data entry form, create new record, add record to table.
- Select and update fields, groups of records.

Amend data records:

- Find, search and replace.
- Edit record.
- Sort, filter, use wildcards and search operators.
- Category.

Check data records:

- Spell check, format, accuracy, consistency, remove duplication.
- Verify data, data validation techniques.
- Record housekeeping.

Error messages:

- Due to field size, data type, validation checks.
- Duplicate records, format.
- Using help.
- System access.

Security risks and procedures:

- Access control.
- Authorised use, confidentiality, personal data, password protection and management, user authentication.

Guidelines for data storage and use:

- Set by employer or organisation or centre.

- Topics covered: security, backup, data format, compliance and reporting, data protection, confidentiality.

Outcome 2 Retrieve and display data records to meet requirements

The learner should be able to and understand:

Search and retrieve:

- Alphanumeric sort, filter, single criteria, multiple criteria, save queries and output.

Reports:

- Standard reports, customised reports.
- Reports with multiple parameters.

Unit 238 Principles of customer relationships

UAN	K/503/8194
Level:	2
Credit value:	3
GLH:	18
Relationship to NOS:	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 7.1.2 Build and deliver customer service and customer care support</p> <p>Marketing 7.1.3 Build and retain effective sales relationships</p> <p>Marketing 7.1.4 Assist in the development of sales support and customer management programmes</p> <p>ICS unit D1</p>
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit concerns understanding customers and their needs, organisations' responses to customer relationships and customer relationship management

Learning outcome
<p>The learner will:</p> <p>1. Understand customers and their needs.</p>
Assessment criteria
<p>The learner can:</p> <p>1.1 describe the importance of understanding customers' wants and needs</p> <p>1.2 explain the role of segmentation in identifying customers' likely wants and needs</p> <p>1.3 describe the factors that motivate customers to buy</p> <p>1.4 explain the importance of seeking customer feedback on performance, products and/or services.</p>

Range
<p>Segmentation:</p> <ul style="list-style-type: none"> • age • gender • religion • culture • income • lifestyle <p>Factors:</p> <ul style="list-style-type: none"> • price • incentives/ promotions • recommendations • needs/ wants • advertising

Learning outcome
The learner will: 2. Understand an organisation's responses to customer relationships.
Assessment criteria
<p>The learner can:</p> <p>2.1 describe an organisation's marketing objectives and activities</p> <p>2.2 explain the importance of developing customer service plans and customer relationship plans</p> <p>2.3 describe an organisation's system for relationship management</p> <p>2.4 describe an organisation's customer care programme</p> <p>2.5 describe the system for communicating with customers</p> <p>2.6 explain the importance of a consistent level of service</p> <p>2.7 explain the link between customer satisfaction and sales growth</p> <p>2.8 explain the importance of using customer feedback to enhance performance, products and/or services.</p>

Range
<p>Customer service plan: General to an organisation.</p> <p>Customer relationship plan: Specific to a client/customer group.</p> <p>System:</p> <ul style="list-style-type: none"> • verbal • non-verbal • survey • questionnaire • emails • texting • phone

- face to face

Learning outcome

The learner will:

3. Understand the principles of customer relationship management.

Assessment criteria

The learner can:

3.1 explain the concept and principles of relationship management

3.2 explain the importance of keeping promises made to customers

3.3 explain the importance of balancing customers' needs with those of the organisation

3.4 explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them

3.5 explain how to identify added value that could be offered to customers.

Unit 239 Manage personal performance and development

UAN	L/506/1788
Level:	2
Credit value:	4
GLH:	18
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LAA1 Manage yourself
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop the knowledge and skills required to manage personal performance and development. Upon completion of this unit, learners will be able to manage their own performance, time and workload. They will also be able to identify their own development needs and fulfil a personal development plan.

Learning outcome
The learner will: 1. Be able to manage personal performance.
Assessment criteria
The learner can: 1.1 agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 agree criteria for measuring progress and achievement with line manager 1.3 complete tasks to agreed timescales and quality standards 1.4 report problems beyond their own level of competence and authority to the appropriate person 1.5 take action needed to resolve any problems with personal performance.

Assessment Guidance

1.1 Objectives are targets to be implemented or completed, or standards of performance to be achieved and maintained.

Objectives provide focus and clear direction, and should be SMART:

- Specific: Clear, unambiguous, straightforward, understandable
- Measurable: Related to quantified or qualitative performance measures
- Achievable: With known resources
- Realistic: Linked to business needs
- Time-bound: Building-in completion date and review dates

In this criterion the learner is required to provide evidence that he or she has:

- identified the relevant business needs of the organisation and agreed this with their line manager
- agreed appropriate and correct SMART objectives with their line manager that support those business needs

1.2 It is important and necessary to measure, or monitor, progress towards objectives with the line manager for a variety of reasons:

- It provides information to see if objectives are being achieved
- It enables any adjustments or improvements to the task to be carried out if they are required
- Monitoring performance with the line manager will provide valuable information for a 'two-way' appraisal or performance review.

The criteria used for measuring progress and achievement will depend upon the SMART objectives, and these criteria will need to be agreed with the line manager.

In this criterion the learner is required to provide evidence that he or she has agreed appropriate and correct criteria for measuring progress towards, and achievement of, SMART objectives with his or her line manager.

1.3 All tasks should be completed within the timescale agreed and to the quality standard required.

Other quality standards make reference to 'conformance with requirements', but the basis of all the definitions of 'Quality' is that the features affecting quality are capable of being tested and are thus objective measures of performance.

In this criterion the learner is required to provide evidence that tasks have been completed to agreed timescales and that they have also been completed to agreed and objective (or measurable) quality standards.

1.4 'Competence' is the ability of an individual to carry out a task properly to the required standard, whilst 'authority' allows its holder to act in certain ways designated by the organisation and to directly influence the actions of others through instructions.

Authority may be:

- Line Authority - reflects the organisational hierarchy
- Staff authority - the right to advise or assist those who possess line authority as well as other staff personnel
- Functional Authority - given to individuals who, in order to meet responsibilities in their own areas, must be able to exercise some control over organisation members in other areas.

In this criterion the learner is required to provide evidence that problems that are beyond both their own level of competence **and** their authority have been reported to the appropriate person.

1.5 Problems with personal performance may arise for a variety of reasons, such as:

- Unfair or unclear expectations as to the task or the individual's role
- Medical issues
- Personal or family issues
- Job dissatisfaction
- Workplace conflict
- Inadequate knowledge or skills, etc.

It is necessary to get to the root cause of any problem with personal performance, and to ensure that the action taken to resolve the problem is appropriate and within the organisation's guidelines, policies and procedures, if applicable.

In this criterion the learner is required to provide evidence that the root cause of any problems with personal performance is identified, and that appropriate action is taken to resolve the problems.

Learning outcome

The learner will:

2. Be able to manage their own time and workload.

Assessment criteria

The learner can:

2.1 plan and manage workloads and priorities using time management tools and techniques

2.2 take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives

2.3 explain the benefits of achieving an acceptable "work-life balance"

Assessment Guidance

2.1 Examples of time management tools and techniques include:

- Covey Time (Task) Management Matrix
- 'To-do' list (monthly, weekly, daily)
- Scheduling tasks and activities
- Diary, paper-based or electronic
- Bespoke time-management documentation or software, etc.

In this criterion the learner is required to provide evidence that he or she is managing workloads and priorities using appropriate time management tools and techniques.

2.2 Distractions that are likely to limit the effective management of time and the achievement of objectives include:

- Telephone interruptions
- Colleagues dropping in without appointments
- Meetings, both scheduled and unscheduled
- Lack of objectives, priorities, and deadlines
- Cluttered desk and personal disorganisation (not having the tools/resources/supplies at your disposal)
- Involvement in routine and detail that should be delegated to others
- Unclear, or lack of, communication and instruction
- Inability to say 'no', etc.

In this criterion the learner is required to provide evidence that he or she has taken appropriate action to minimise the effects of workplace distractions that are likely to limit the effective management of time and the achievement of objectives.

2.3 There are benefits to the employer and to the employee from achieving an acceptable "work-life" balance.

Employer benefits include:

- reduced staff turnover
- lower recruitment and training costs, due to decreased turnover
- reduced absenteeism due to higher levels of well being
- gaining a reputation as a good employer or an employer of choice
- better attraction and retention of staff
- reduced stress levels amongst staff
- improved morale and job satisfaction
- greater staff loyalty and commitment
- improved productivity

Employee benefits include:

- a reduction in the impact of work on home and family life and vice a versa
- reduced stress levels and higher levels of well being
- control over time management in meeting work-life commitments

- autonomy to make decisions regarding work-life balance
- increased focus, motivation and job satisfaction knowing that family and work commitments are being met
- increased job security from the knowledge that an organisation understands and supports workers with family responsibilities

In this criterion the learner is required to **explain** how benefits for the employee or for the employer follow from having an acceptable “worklife balance”; it is not acceptable to merely list a number of benefits.

Learning outcome

The learner will:

3. Be able to identify their own development needs.

Assessment criteria

The learner can:

3.1 identify organisational policies relating to personal development

3.2 explain the need to maintain a positive attitude to feedback on performance

3.3 explain the potential business benefits of personal development

3.4 identify their own preferred learning style(s)

3.5 identify their own development needs from analyses of the role, personal and team objectives

3.6 use feedback from others to identify their own development needs

3.7 agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs.

Assessment Guidance

3.1 Organisational policies relating to personal development will vary, depending upon the type and nature of the organisation.

Examples include:

- Staff Development Policy
- Training and Development Policy
- Professional Development Policy
- Organisational and Professional Development Policy etc.

In this criterion the learner is required to identify organisational policies relating to personal development.

3.2 Feedback is important to keep colleagues informed as to how well they are doing and to help them improve.

Properly given, feedback should be about performance, not personality, so the individual receiving the feedback should not allow emotions to be part of his or her reaction to feedback: a positive attitude is required in order to listen carefully to what is being said, to take the time to consider the value of the feedback, and to ask the person giving the feedback on how you can improve.

In this criterion the learner is required to describe what is meant by a positive attitude in order to then explain why it is necessary to maintain a positive attitude to feedback on performance.

3.3 'Personal development' is taken here to include 'professional development' in the sense of undertaking personal development to build human capital, skills and knowledge.

The potential business benefits of personal development include:

- improved workplace performance
- linking training and development activities to business needs and career development
- identifying talent and potential in the organisation
- improved staff morale and motivation
- introducing fresh ideas in the organisation
- linking training and development to SMART objectives and performance management etc.

In this criterion the learner is required to describe what is meant by personal development in order to then explain potential business benefits of personal development; it is not sufficient to merely list potential business benefits.

3.4 Individuals differ in how they learn, and there are a number of learning styles models that can be used to identify an individual's learning style, perhaps the most widespread being the Honey and Mumford adaptation of Kolb's experiential model:

- Activist
- Reflector
- Theorist
- Pragmatist

In this criterion the learner is required to provide evidence that he or she has correctly identified their own learning style using an appropriate model.

3.5 Analysing own role and personal and team objectives is undertaken in order to identify the future development needs that are required to acquire the skills and knowledge for career development and for effective performance in the workplace both now and in the future.

Use will be made of internal documents such as job description, person specification, personal development plans, business plans, team plans and objectives, etc., and relevant documents will be analysed to identify development needs.

In this criterion the learner is required to analyse relevant documents, where available, relating to own role and personal and team objectives in order to identify own development needs.

3.6 Feedback from others is important in identifying development needs as good feedback enables individuals and groups to be aware of what they do and how they do it, and helps individuals learn, grow and develop.

Feedback may be formal, as in a performance review, or it may be informal, as in on-going advice or observations given outside the formal process.

In this criterion the learner is required to provide evidence that he or she has used examples of formal or informal feedback from others to identify development needs.

3.7 Having identified development objectives from feedback and analysing own role and personal and team objectives, the next step is to turn them into SMART objectives that are agreed with the appropriate manager or supervisor.

In this criterion the learner is required to provide evidence that appropriate and correct SMART development objectives that align with organisational and personal needs are agreed with the appropriate manager or supervisor.

Learning outcome

The learner will:

4. Be able to fulfil a personal development plan.

Assessment criteria

The learner can:

4.1 agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms

4.2 make use of formal development opportunities that are consistent with business needs

4.3 use informal learning opportunities that contribute to the achievement of personal development objectives

4.4 review progress against agreed objectives and amend plans accordingly

4.5 share lessons learned with others using agreed communication methods.

Assessment Guidance

4.1 The SMART objectives should now form part of an agreed personal development plan that sets out what needs to be done and how it is to be done, and provides details of the resources required, the timescales, and the review mechanisms.

In this criterion the learner is required to provide evidence that he or she has agreed a correct and appropriate personal development plan that specifies actions, methods, resources, timescales and review mechanisms.

4.2 Formal development takes place in an organised and structured setting with explicit learning outcomes and objectives, and typically leads to certification or some other recognition that it has been completed to a certain standard.

In this criterion the learner is required to provide evidence that he or she has made use of formal development opportunities that are consistent with business needs.

4.3 Informal learning results from daily activities related to work, family or leisure, and is not organised or structured in terms of learning outcomes and objectives.

In this criterion the learner is required to provide evidence that he or she has used informal development opportunities that contribute to the achievement of personal development objectives.

4.4 Agreed objectives and review mechanisms are addressed in assessment criteria 3.7 and 4.1.

In this criterion the learner is required to provide evidence that he or she has correctly and appropriately reviewed progress against agreed objectives and amended plans accordingly.

4.5 Reflecting on personal development provides an opportunity to ask such questions as 'What went well?', 'What didn't go well?', and 'What would I do differently next time?'

Sharing 'lessons learned' with others enables successes to be built upon and previous mistakes to be avoided, and may take place, for example, in a performance review or appraisal interview, a learning community, or as part of a review of a development activity.

In this criterion the learner is required to provide evidence that he or she has shared lessons learned from own personal development with others using agreed communication methods.

Unit 240 **Develop working relationships with colleagues**

UAN	R/506/1789
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	<p>Management & Leadership (2012) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFAM&LDD1 Develop and sustain productive working relationships with colleagues
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	<p>This unit aims to develop the knowledge and skills required to develop working relationships with colleagues, and introduces learners to the key principles underpinning effective team working. Upon completion of this unit, learners will be able to maintain effective working relationships with colleagues and work collaboratively to resolve problems.</p>

Learning outcome

The learner will:

1. Understand the principles of effective team working.

Assessment criteria

The learner can:

- 1.1 outline the benefits of effective team working
- 1.2 describe how to give feedback constructively
- 1.3 explain conflict management techniques that may be used to resolve team conflicts
- 1.4 explain the importance of giving team members the opportunity to discuss work progress and any issues arising
- 1.5 explain the importance of warning colleagues of problems and changes that may affect them.

Assessment Guidance

1.1 Benefits of effective team working include:

- greater flexibility within the team
- high morale
- increased efficiency
- mutual support
- better ideas from the team
- etc.

In this criterion the learner is required to provide an outline of the main features of benefits of effective team working; it is not acceptable to merely list benefits.

1.3 Conflict may be defined as the internal or external discord that occurs as a result of differences in ideas, values or beliefs of two or more people.

Conflict management is important in order to:

- maintain morale
- maintain performance standards
- minimise absenteeism
- promote a safe working environment
- maintain group cohesion, etc.

Conflict management techniques that may be used to resolve team conflicts include:

- Win-Win (collaborating) o Attempting to identify the underlying concerns in order to find an alternative that satisfies everyone
- Compromise o Working to a mutually-acceptable solution that partially satisfies everyone
- Forcing o Using formal authority or coercion to get one's own way at the expense of others
- Avoiding o Not addressing the conflict, withdrawing from a threatening situation
- Accommodating o Neglecting own concerns to satisfy others

In this criterion the learner is required to explain how conflict management techniques may be used to resolve team conflicts. (Using examples may make this more relevant.)

1.4 Discussing work progress and any issues arising with team members provides an opportunity to:

- acknowledge team achievements and celebrate success
 - discuss strengths and identify areas for improvement
- clarifying and agreeing any steps required to improve performance
- identify how systems, procedures, work methods might be improved, etc.

In this criterion the learner is required to describe reasons that explain the importance of giving team members the opportunity to discuss work progress and any issues arising. (Using examples may make this more relevant.)

1.5 Warning colleagues of problems and changes that may affect them allows issues to be addressed before they get out of hand and are still manageable, and allows possible solutions to be explored as opposed to merely reacting to a situation.

Failure to warn might also threaten the trust relationship with colleagues, who will typically assume the worst if there is a failure to communicate.

In this criterion the learner is required to describe reasons that explain the importance of warning colleagues of problems and changes that may affect them. (Using examples may make this more relevant.)

Learning outcome

The learner will:

2. Be able to maintain effective working relationships with colleagues.

Assessment criteria

The learner can:

2.1 recognise the contribution of colleagues to the achievement of team objectives

2.2 treat colleagues with respect, fairness and courtesy

2.3 fulfil agreements made with colleagues

2.4 provide support and constructive feedback to colleagues.

Assessment Guidance

2.1 Colleagues want to be appreciated, and recognising their contribution to the achievement of team objectives lets them know that their efforts are noticed and valued.

Praise should be timely, direct, personal and specific, with colleagues being told exactly what they do well and why their contribution is appreciated.

There are numerous ways to recognise an colleague's contribution, and the praise must be given in a way that is meaningful to the colleague: some colleagues may prefer to be praised in public, for example, whilst others may be more comfortable with being praised in private, and some colleagues will find it more meaningful to have their contribution recognised by a higher-level manager.

In this criterion the learner is required to provide evidence that he or she has recognised in an appropriate and meaningful way the contribution of colleagues to the achievement of team objectives.

2.2 Colleagues will be better motivated to complete allocated tasks if they feel they are being listened to and that they are appreciated as part of a team.

Treating colleagues with respect, courtesy and fairness is fundamental in creating a positive climate within the team in order to influence team members to feel motivated.

In this criterion the learner is required to provide appropriate evidence that he or she has treated colleagues with respect and fairness and courtesy.

2.3 Fulfilling agreements is one way to ensure you develop working relationships with colleagues, within your own organisation and within other organisations, which are productive in terms of supporting and delivering your work and that of your organisation.

Colleagues should be informed when agreements have been fulfilled, or advised promptly of any difficulties or where it will be impossible to fulfil agreements.

In this criterion the learner is required to provide evidence of correctly and appropriately fulfilling agreements made with colleagues.

2.4 Providing support to colleagues might include:

- explaining policies, procedures, task requirements
- helping with their workload
- problem-solving
- obtaining additional resources
- providing encouragement
- providing constructive feedback that focuses on issues and solutions, not personalities or blame

In this criterion the learner is required to provide evidence of appropriate support to colleagues and constructive feedback to two or more colleagues.

Learning outcome

The learner will:

3. Be able to collaborate with colleagues to resolve problems.

Assessment criteria

The learner can:

3.1 take others' viewpoints into account when making decisions

3.2 take ownership of problems within own level of authority

3.3 take action to minimise disruption to business activities within their own level of authority

3.4 resolve problems within their own level of authority and agreed contribution.

Assessment Guidance

3.1 Empathy is the ability to identify and understand another's situation, feelings and viewpoints, and to 'put yourself in the other person's shoes'.

Successful leaders and managers work hard to understand others' viewpoints in a particular situation. They acknowledge others' viewpoints when making decisions and consider the impact of their choices on the wellbeing and interests of others.

In this criterion the learner is required to provide evidence that he or she understands the viewpoints of colleagues in particular situations and has taken their viewpoints into account when making decisions on those situations.

3.2 'Level of authority' refers to the different hierarchical management levels in an organisation and the duties and responsibilities assigned to each of those levels.

The more senior roles in an organisation will have greater authority to give instructions and make decisions and to ensure compliance with organisational policies and procedures, and problems that lie outside own level of authority must be referred to a more senior manager at the appropriate level.

The authority given to a role is usually formalised in a job description, which will generally include the roles and responsibilities of the job as well as the job-holder's direct report.

In this criterion the learner is required to provide evidence that he or she has taken ownership of problems within own level of authority.

3.3 Business activities are activities that provide a product or service that customers require, and a disruption to business activities could have far-reaching consequences for the organisation, such as:

- loss of income
- loss of reputation
- loss of customers
- penalty payments for not meeting deadlines

- failure of the business

It is therefore the responsibility of everyone in an organisation to take appropriate and effective action, within their own level of authority, to minimise disruption to business activities.

In this criterion the learner is required to provide evidence that he or she has taken effective and appropriate action, within own level of authority, to minimise disruption to business activities.

3.4 'Resolve problems' is taken here to mean the resolution of problems relating to working relationships with colleagues.

To resolve a problem is to find an effective and satisfactory answer or solution, and a problem with working relationships with colleagues may be resolved formally or informally, depending upon the nature and extent of the problem.

If the problem with a working relationship is a relatively minor issue, then an informal resolution may be possible.

If, however, the problem is more serious, then it may be necessary to use the organisation's formal disciplinary or grievance procedures.

If the formal procedures are used, then each procedure should specify the level of authority appropriate to each stage.

In this criterion the learner is required to provide evidence that he or she has appropriately resolved, either formally or informally, problems relating to working relationships with colleagues. The evidence should additionally demonstrate the learner's agreed contribution within the learner's own level of authority.

Unit 241 Principles of team leading

UAN	Y/506/1812
Level:	2
Credit value:	5
GLH:	37
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBA3 Lead your team
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim	This unit aims to develop knowledge and understanding required to lead a team. Upon completion of this unit, learners will have developed an understanding of key team leading principles, including leadership styles, team dynamics and team motivation. Learners will also develop an understanding of techniques used to manage the work of teams and the impact of change management within a team.

Learning outcome
The learner will: 1. Understand leadership styles in organisations.
Assessment criteria
The learner can: 1.1 describe characteristics of effective leaders 1.2 describe different leadership styles 1.3 describe ways in which leaders can motivate their teams 1.4 explain the benefits of effective leadership for organisations.

Assessment Guidance

1.1

- In order to be effective and successful, a leader should have any number of skills or qualities that ensure he or she is respected by the team as their leader and as someone who will ensure team tasks are completed on time to the appropriate standard.
- You are required to describe the principal features of characteristics of effective leaders.

1.2

- Leadership styles used by the leader will often depend upon the team and/or the nature of the work, and the three most recognisable leadership styles are autocratic, democratic and laissez-faire.
- You are required to describe the principal features of leadership styles.

1.3

- Herzberg's Motivation-Hygiene Theory and Maslow's Hierarchy of Needs are two important theories of motivation that describe how individuals can be motivated at work.
- You are required to describe ways in which motivation theory can be used to motivate your teams.

1.4

- Leaders will have responsibility for a variety of tasks, such as planning work, organising resources, making improvements and controlling work activities, and maintaining morale and motivation.
- You are required to explain how doing of these tasks effectively as a leader will benefit the organisation. (You may wish to provide examples to illustrate your answer.)

Learning outcome

The learner will:

2. Understand team dynamics.

Assessment criteria

The learner can:

- 2.1 explain the purpose of different types of teams
- 2.2 describe the stages of team development and behaviour
- 2.3 explain the concept of team role theory
- 2.4 explain how the principle of team role theory is used in team building and leadership
- 2.5 explain typical sources of conflict within a team and how they could be managed.

Assessment Guidance

2.1

- Organisations may use different types of teams, depending on the situation and the nature of the task.
- Some teams may be permanent, others may be temporary, and the type of team will affect the organisation of the team and how it communicates with other teams in the organisation.
- Examples include:
 - Functional teams
 - Cross-functional teams
 - Self-managed teams
 - Virtual teams
 - Task Forces
 - Project teams
 - Quality Circles
- You are required to explain the purpose of different types of teams.

2.2

- Tuckman's stages of team development maintains that teams have to go through a series of phases before they eventually become effective and start to deliver results.
- You are required to describe all the stages of team development and the team behaviours that are exhibited at each stage.

2.3

- Belbin's Team Role Theory suggests that high-performing teams are built on a balance of basic roles, with each member of the team performing at least one of those roles.
- You are required to explain the concept of team role theory by describing how each of the basic roles identified by Belbin contribute to team performance.

2.4

- You are required to explain how knowing the basic roles identified by Belbin can be used to build teams and help leadership.

2.5

- Conflict may be defined as the internal or external discord that occurs as a result of differences in ideas, values or beliefs of two or more people.
- Conflict management is important in order to:
 - maintain morale
 - maintain performance standards
 - minimise absenteeism
 - promote a safe working environment
 - maintain group cohesion
 - etc.
- Depending upon the severity and level of conflict, conflict may be resolved or reduced informally, but in some cases it may be necessary to use the organisation's formal procedures.
- Conflict management techniques that may be used to resolve team conflicts include:

- Win-Win (collaborating)
 - Attempting to identify the underlying concerns in order to find an alternative that satisfies everyone
- Compromise
 - Working to a mutually-acceptable solution that partially satisfies everyone
- Forcing
 - Using formal authority or coercion to get one's own way at the expense of others
- Avoiding
 - Not addressing the conflict, withdrawing from a threatening situation
- Accommodating
 - Neglecting own concerns to satisfy others
- If the formal procedures are used, then each procedure should specify the level of authority appropriate to each stage.
- You are required to provide examples that explain how conflict is typically caused within a team and then go on to explain what you would do to manage that conflict.

Learning outcome

The learner will:

3. Understand techniques used to manage the work of teams.

Assessment criteria

The learner can:

3.1 explain the factors to be taken into account when setting targets

3.2 describe a range of techniques to monitor the flow of work of a team

3.3 describe techniques to identify and solve problems within a team.

Assessment Guidance

3.1

- 'Targets' are sometimes used interchangeably with 'objectives' to provide focus and clear direction, and should be SMART:
 - Specific: Clear, unambiguous, straightforward, understandable
 - Measurable: Related to quantified or qualitative performance measures
 - Achievable: With known resources
 - Realistic: Linked to business needs
 - Time-bound: Building-in completion date and review dates
- You are required to explain, using an example, how to take account of the SMART factors when setting targets.

3.2

- Monitoring the flow of work of a team and checking the progress of the team and team members is important in order to ensure individual and team targets are being met, and will

usually involve some form of data collection and measuring or checking of records or progress on such factors as quality, output, productivity, schedules, use of materials, etc.

- You are required to describe the principal features of techniques to monitor the flow of work of a team.

3.3

- Problem-solving solving techniques may be rational or creative, and include:
 - Rational problem-solving
 - Root Cause Analysis (RCA) and 'fishbone' diagram
 - Creative problem-solving
 - Brainstorming
 - 5Ws (Who, What, Where, When, Why)
 - Six Thinking Hats
 - Mind-Mapping
- You are required to describe the principal features of problem-solving techniques within a team.

Learning outcome

The learner will:

4. Understand the impact of change management within a team.

Assessment criteria

The learner can:

4.1 describe typical reasons for organisational change

4.2 explain the importance of accepting change positively

4.3 explain the potential impact on a team of negative responses to change

4.4 explain how to implement change within a team.

Assessment Guidance

4.1

- There are many reasons for organisational change, such as:
 - The need to improve quality, productivity, profit
 - Innovation
 - New technology
 - Cost reductions
 - Changing market conditions
 - Out-of-date working practices
 - etc.
- You are required to describe the principal features of typical reasons for organisational change.

4.2

- Change affects individuals, and when change occurs in an organisation it is important to realise that people need time to adjust.
- Keeping a positive attitude can help people deal with the uncertainty in change and enable individuals to focus on how

they can make the best of their existing skills and experience and look for opportunities that arise as a result of the change.

- You are required to provide examples that explain the importance of accepting change positively.

4.3

- Negative responses to change within a team may lead to undesirable situations in the workplace such as a reduction in efficiency, a disruptive work environment, and an increase in conflict.
- You are required to explain, using examples, the potential impact on a team of negative responses to change.

4.4

- There are a number of models that can be used to explain how to implement change within a team, including:
 - Lewin's Change Management model
 - Kubler-Ross Stages of Change model
 - ADKAR Action-Orientated model
- You are required to use an appropriate change model to explain how to implement change within a team.

Learning outcome

The learner will:

5. Understand team motivation.

Assessment criteria

The learner can:

5.1 explain the meaning of the term "motivation"

5.2 explain factors that affect the level of motivation of team members

5.3 describe techniques that can be used to motivate team members

5.4 explain how having motivated staff affects an organisation.

Assessment Guidance

5.1

- You are required to provide a clear and correct explanation of what is meant by 'motivation'.

5.2

- You are required to explain how, according to a theory of motivation, factors affect the level of motivation of team members.

5.3

- You are required to describe the principal features of techniques that, according to a theory of motivation, can be used motivate team members.

5.4

- Motivated staff tend to perform better in the workplace and show more commitment to their job, and this has an impact upon, for example, team and organisational performance and staff retention rates.
- You are required to explain, with examples, how having motivated staff affects an organisation.

Unit 242 Using email

UAN	M/502/4300
Level:	2
Credit value:	3
GLH:	20
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 2 the National Occupational Standards for IT users devised by Tech Partnership (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Tech Partnership, the Sector Skills Council for ICT. See IT User Assessment Strategy available from Tech Partnership website for assessment guidance.
Aim	This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages. On completion of this unit a candidate should be able to understand and make effective use of a range of intermediate e-mail software tools to send, receive and store messages for at times non-routine or unfamiliar activities.

Learning outcome
The learner will: 1. Use e-mail software tools and techniques to compose and send messages.
Assessment criteria
The learner can: 1.1 select and use software tools to compose and format e-mail messages, including attachments 1.2 determine the message size and how it can be reduced 1.3 send e-mail messages to individuals and groups 1.4 describe how to stay safe and respect others when using e-mail 1.5 use an address book to organise contact information.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

2. Manage incoming e-mail effectively.

Assessment criteria

The learner can:

- 2.1 follow guidelines and procedures for using e-mail
- 2.2 read and respond to e-mail messages appropriately
- 2.3 use email software tools and techniques to automate responses
- 2.4 describe how to archive e-mail messages, including attachments
- 2.5 organise, store and archive e-mail messages effectively
- 2.6 respond appropriately to e-mail problems.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account.

Unit 243 Presentation software

UAN	M/502/4622
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 2 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim	<p>This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing. On completion of this unit a candidate should be able to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Presentation tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions used will be at times non-routine or unfamiliar; • the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and • the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

Learning outcome
The learner will: 1. Input and combine text and other information within presentation slides.
Assessment criteria
The learner can: 1.1 identify what types of information are required for the presentation 1.2 enter text and other information using layouts appropriate to type of information 1.3 insert charts and tables into presentation slides 1.4 insert images, video or sound to enhance the presentation 1.5 identify any constraints which may affect the presentation 1.6 organise and combine information of different forms or from different sources for presentations 1.7 store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • questioning • product • reflective account

Learning outcome
The learner will: 2. Use presentation software tools to structure, edit and format slide sequences.
Assessment criteria
The learner can: 2.1 identify what slide structure and themes to use 2.2 select, change and use appropriate templates for slides 2.3 select and use appropriate techniques to edit slides and presentations to meet needs 2.4 select and use appropriate techniques to format slides and presentations 2.5 identify what presentation effects to use to enhance the presentation 2.6 select and use animation and transition effects appropriately to enhance slide sequences.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

3. Prepare slideshow for presentation.

Assessment criteria

The learner can:

- 3.1 describe how to present slides to meet needs and communicate effectively
- 3.2 prepare slideshow for presentation
- 3.3 check presentation meets needs, using IT tools and making corrections as necessary
- 3.4 identify and respond to any quality problems with presentations to ensure that presentations meet needs.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account.

Unit 243 **Presentation software**

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine text and other information within presentation slides

The learner should be able to and understand:

Types of information:

- Text, numbers, images, graphics, sound, video.

Images, video or sound for presentations:

- Clip-art, photo, scanned images, borders, create diagrams or graphics, image formats.
- Pre-recorded audio/video clips, audio and video formats.

Charts and tables for presentations:

- Table, pie chart, graph, diagram, organisational chart, flowchart.

Combine information for presentations:

- Combine images, charts, tables with text by inserting, re-sizing and positioning; use of text boxes, presentation with audio and/or video, import information produced using other software.
- Reference external information with hyperlinks.

Constraints:

- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism.
- Equal opportunities, other local guidelines.
- On delivery (eg environment, timing).

Store and retrieve:

- Save, save as, find, open, close.
- Naming protocols.
- Reducing file size, save presentation as a stand-alone show or as web pages.

Outcome 2 Use presentation software tools to structure, edit and format slide sequences

The learner should be able to and understand:

Slide structure:

- Layout.
- Use existing templates, designs and styles, organisational guidelines.
- Adapt and create new templates.

Presentation effects:

- Video, sound, animation, slide transitions, visual and sound effects, hyperlinks.

Edit slides:

- Size, crop and position objects.
- Wrap text, add captions and graphic elements, slide order.
- Change orientation.

Animation and transition effects:

- Adding and removing hyperlinks.
- Apply and create transitions, apply animations.

Format slides:

- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds, colour schemes, master slides.
- Themes.

Outcome 3 Prepare slideshow for presentation

The learner should be able to and understand:

Present slides:

- Timing, content, meaning.
- Organisation of information.
- Audience needs, location.

Prepare slides:

- View and re-order slides.
- Rehearse timing and effects.
- Set up and amend slide show settings.
- Print slides, handouts and speaker notes.

Check presentation:

- Spell check; grammar check, orientation, layout, slide order, text alignment and formatting, accuracy, clarity, transitions and timings.

Quality problems with presentations:

- Will vary according to the content, for example:
 - Text: formatting, styles.
 - Images: size, position, orientation
 - Effects: timing, brightness, contrast, sound levels, order of animations.

Unit 244 Word processing software

UAN	R/502/4628
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 2 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim	<p>This is the ability to use a software application designed for the creation, editing and production of largely text-based documents. On completion of this unit a candidate should be able to select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Word processing tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none">• the software tools and functions will be at times non-routine or unfamiliar;• the choice of techniques will need to take account of a number of factors or elements; and• the user will take some responsibility for the inputting, manipulating and outputting of the information.

Learning outcome

The learner will:

1. Enter and combine text and other information accurately within word processing documents.

Assessment criteria

The learner can:

- 1.1 identify what types of information are needed in documents
- 1.2 use appropriate techniques to enter text and other information accurately and efficiently
- 1.3 select and use appropriate templates for different purposes
- 1.4 identify when and how to combine and merge information from other software or other documents
- 1.5 select and use a range of editing tools to amend document content
- 1.6 combine or merge information within a document from a range of sources
- 1.7 store and retrieve document and template files effectively, in line with local guidelines and conventions where available.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

2. Create and modify layout and structures for word processing documents.

Assessment criteria

The learner can:

- 2.1 identify the document requirements for structure and style
- 2.2 identify what templates and styles are available and when to use them
- 2.3 create and modify columns, tables and forms to organise information
- 2.4 select and apply styles to text.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

3. Use word processing software tools to format and present documents effectively to meet requirements.

Assessment criteria

The learner can:

3.1 identify how the document should be formatted to aid meaning

3.2 select and use appropriate techniques to format characters and paragraphs

3.3 select and use appropriate page and section layouts to present and print documents

3.4 describe any quality problems with documents

3.5 check documents meet needs, using IT tools and making corrections as necessary

3.6 respond appropriately to quality problems with documents so that outcomes meet needs.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account.

Unit 244 Word processing software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Enter and combine text and other information accurately within word processing documents

The learner should be able to and understand:

Types of information:

- Text, numbers, images, other graphic elements (eg lines, borders).
- Hyperlinks, charts, objects.

Keyboard or other input method:

- Keyboard skills: using the full range of keys, typing accurately and efficiently, keyboard shortcuts
- Other input methods: voice recognition, touch screen, stylus

Combine information:

- Insert, size, position, wrap, order, group, link information in a document to another source.
- Mail merge documents and labels.
- Hyperlinks

Templates:

- Existing templates (eg blank document, fax, letter, web page), create new templates for common documents

Editing tools:

- Editing tools appropriate to the type of information, for example: select, copy, cut, paste, undo, redo, drag and drop, find, replace, insert, delete, size, crop, position.

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find, share).
- Version control.
- Import/export.
- File size; folders (eg create, name).

Outcome 2 Create and modify layout and structures for word processing documents

The learner should be able to and understand:

Requirements for structure and style:

- Document layout, house style.

Tables and forms:

- Insert and delete cells, rows and columns, adjust row height and column width.
- Add and amend table structure, merge cells, complete forms and tables, insert and modify form fields, convert text to table.
- Merge and split cells, horizontal and vertical text alignment, cell margin, add borders and shading, sort.

Columns:

- Add and delete columns, modify column width, add columns to whole document and part of a page.

Styles:

- Heading styles: apply or change existing styles to a word, line, paragraph or section.
- Define styles for different elements of common documents.

Page layouts:

- Paper size and type, change page orientation, margins, page breaks, page numbering, section breaks.
- Header and footer, date and time, adjust page set up for printing.

Outcome 3 Use word processing software tools to format and present documents effectively to meet requirements

The learner should be able to and understand:

Format characters:

- Size, font style (typeface), colour, bold, underline, italic, superscript, subscript, special characters and symbols.

Format paragraphs:

- Alignment, numbering, line spacing, widows and orphans.
- Tabs and indents.
- Borders, bullets, shading.

Check word processed documents:

- Spell check, grammar check, typeface and size, hyphenation.
- Page layout, margins, line and page breaks, tables.
- Print preview.
- Accuracy, consistency, clarity.
- Language and dictionary settings.

Quality problems with documents:

- Will vary according to the content, for example: o text (eg styles, structure, layout) o images (eg size, position, orientation) o numbers (eg decimal points, results of any calculations).

Unit 245 Website software

UAN	R/502/4631
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 2 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim	<p>This is the ability to use a software application designed for planning, designing and building websites. On completion of this unit a candidate should be able to select and use a wide range of intermediate website software tools and techniques to produce multiplepage websites.</p> <p>Website software tools and techniques will be defined as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be nonroutine or unfamiliar; • the choice and use of development techniques will need to take account of a number of factors or elements; and • the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.

Learning outcome

The learner will:

1. Create structures and styles for websites.

Assessment criteria

The learner can:

- 1.1 describe what website content and layout will be needed for each page
- 1.2 plan and create web page templates to layout
- 1.3 select and use website features and structures to help the user navigate round web pages within the site
- 1.4 create, select and use styles to keep the appearance of web pages consistent and make them easy to understand
- 1.5 describe how copyright and other constraints may affect the website
- 1.6 describe what access issues may need to be taken into account
- 1.7 describe what file types to use for saving content
- 1.8 store and retrieve files effectively, in line with local guidelines and conventions where available.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

2. Use website software tools to prepare content for websites.

Assessment criteria

The learner can:

- 2.1 prepare content for web pages so that it is ready for editing and formatting
- 2.2 organise and combine information needed for web pages including across different software
- 2.3 select and use appropriate editing and formatting techniques to aid both clarity and navigation
- 2.4 select and use appropriate development techniques to link information across pages
- 2.5 change the file formats appropriately for content
- 2.6 check web pages meet needs, using IT tools and making corrections as necessary.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome

The learner will:

3. Be able to publish websites.

Assessment criteria

The learner can:

- 3.1 select and use appropriate testing methods to check that all elements of websites are working as planned
- 3.2 identify any quality problems with websites and how to respond to them
- 3.3 select and use an appropriate programme to upload and publish the website
- 3.4 respond appropriately to problems with multiple page websites.

Assessment Guidance**Evidence may be supplied by:**

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account.

Unit 245 Website software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Create structures and styles for websites

The learner should be able to and understand:

Content and layout:

- Web page content and layout will vary according to the template, but may include:
 - text (eg body text, headings, captions)
 - images (eg still photographs, diagrams)
 - numbers (eg tables, charts or graphs)
 - background (eg colours, gradients, patterns, textures)
 - structure (eg frames, side bars)
 - moving images (eg constraints of use, animation, video clips).
- Effect of copyright law (eg on music downloads or use of other people's images).
- Acknowledgment of sources, avoiding plagiarism.
- Permissions.

Website features:

- Web page features will vary, but may include:
 - navigation (eg action buttons, links, hot spots, menus, hyperlinks, pop-ups)
 - multimedia (eg sound linked to actions, video clips, sound track)
 - sound (eg clips linked to navigation, background music, video sound track).

Web page templates:

- Design layout will vary but may include:
 - text (eg body text, headings, captions)
 - images (eg still photographs, diagrams)
 - numbers (eg tables, charts or graphs),
 - background (eg colours, gradients, patterns, textures)
 - structure (eg frames, side bars)
 - moving images (eg animation, video clips)
 - sound (eg clips linked to navigation, background music, video sound track).

Web page styles:

- Styles will vary according to the different elements of the website design, but may include:
 - typeface (eg font, colour, size and alignment of headings, captions or body text)

- lines (eg type, thickness and colour of borders, tables, diagrams).

Access issues:

- The difficulties different users may have in accessing websites, accessibility guidelines, affect of download speeds (eg from different browser software, connection type, size of web page contents).

File types:

- Text (eg rtf, doc, pdf).
- Images (eg jpeg, tiff, psd).
- Charts and graphs (eg xls).
- Sound (eg wav, MP3).

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find, share), file size.
- Version control.
- Import data, export data.
- Folders (eg create, name).

Outcome 2 Use website software tools to prepare content for websites

The learner should be able to and understand:

Combine information:

- Combine images with text (eg photo captions).
- Presentation with audio and/or video; numbers with charts and graphs.
- Text alignment, captions, text wrap.
- Behind, in front, grouping.

Editing techniques:

- Editing techniques will vary in line with the type of information, for example:
 - select, copy, cut, paste, undo, redo, drag and drop, find, replace, size, crop, position, change templates.

Development techniques:

- Creating links to bookmark text within a page, linking web pages together, adding a link to another website, altering simple code using programming language.

File formats:

- Change format of documents to RTF or HTML.

Check web pages:

- Will vary depending on the content but may include, for example:

- Text: spell check; grammar check, type face and size, hyphenation.
- Layout: page layout, margins, line and page breaks, tables, frames, sections.
- Images: size, alignment and orientation, suitability of file format, appropriate choice of colour mode and use of filters, fitness for purpose of image resolution.

Outcome 3 Publish websites

The learner should be able to and understand:

Testing methods:

- Methods will vary but may include:
 - viewing web pages using browser software, testing navigation round pages within multiple page website, testing external links.

Problems with websites:

- Problems may vary, but could include:
 - content that is not appropriate for the template or missing
 - text that is not readable or missing
 - images that are oriented or sized wrongly
 - navigation that does not work as planned
 - multimedia features (eg sound levels, image resolution, synchronisation of sound and images).

Upload and publish website:

- Upload content to a template.
- Use file exchange programme to upload and publish (eg FTP or HTTP).

Unit 246 Know how to publish, integrate and share using social media

UAN	R/505/3515
Level:	2
Credit value:	5
GLH:	40
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning outcome
The learner will: 1. Know the current social networks used to publish, integrate and share online.
Assessment criteria
The learner can: 1.1 identify the main social media networks in current use 1.2 describe the main features of each social media network identified 1.3 describe why they would use each of the social media networks identified 1.4 explain the purpose of a ' social aggregator ' tool 1.5 describe how blogs give individuals a voice on the Web 1.6 explain how professionals make connections using social media networks.

Range
Social media networks: eg <ul style="list-style-type: none"> • Facebook • Twitter • Google+ • Pinterest • YouTube • LinkedIn

Main features: eg

Facebook

- like feature o posts o pictures o companies
- timeline
- share content
- find/add friends
- notifications
- private messages

Google+

- share content
- circles
- +1 post
- communities

Pinterest

- boards
- share pins
- media platform
- follow me
- pin it

YouTube

- share videos
- video channels
- videos can be shared on other social media channels
- like, comment

Reasons for using social media networks:

Social

- sharing information
- sharing media
- social interaction
- creating events
- hangouts
- real time engagement

Business

- video conferencing
- sharing information
- sharing media
- creating events
- business networking
- advertising

Social aggregator tool:

- Rebel Mouse
- Postano
- Tweetech
- Hootsuite

Voice on the Web:

- interacting with likeminded people
- raising awareness of issues
- sharing media
- promoting products
- social and business networking

Connections:

- invitations to join groups
- invitations to follow
- following
- sharing professional articles
- sharing content

Learning outcome

The learner will:

2. Understand how social media is used by individuals, organisations/businesses, governments and social groups.

Assessment criteria

The learner can:

2.1 describe why

- a. individuals
- b. organisations/businesses
- c. governments
- d. social groups

use social media networking sites

2.3 explain the advantages and **typical components** of a social media user profile

2.4 identify the benefits of using social media networking for:

- a. individuals
- b. organisations/businesses
- c. governments
- d. social groups

2.4 identify the **risks** of using social media networking for:

- a. individuals
- b. organisations/businesses
- c. governments
- d. social groups

2.5 describe how social media networks **monitor engagement** with their websites

2.6 describe the **advantages** of podcasting

2.7 explain why organisations have social media policies.

<p>Range</p> <p>Typical components:</p> <ul style="list-style-type: none"> • biography • appropriate photos • engaging • representation of personality • links to relevant interests/people <p>Risks:</p> <ul style="list-style-type: none"> • trolling • grooming • cyber bullying • fraud • terrorism • inadvertent disclosure of sensitive information <p>Monitor engagement:</p> <ul style="list-style-type: none"> • bandwidth monitoring • chat room moderation • server statistical analysis • user tracking (eg statistical analysis within Facebook) <p>Advantages:</p> <ul style="list-style-type: none"> • easy to consume • portable • make information personal • on-demand technology • data collection and analysis
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<p>Learning outcome</p> <p>The learner will:</p> <p>3. Understand best practices for safe social networking.</p>
<p>Assessment criteria</p> <p>The learner can:</p> <p>3.1 describe appropriate precautions to ensure their own safety and privacy</p> <p>3.2 describe how to protect personal information when engaging with social media websites</p> <p>3.3 identify legal constraints on the uploading and downloading of software and other digital content.</p>

Range

Assessment criteria 3.1 and 3.2 need to be covered together.

Other digital content:

- photographs
- images
- music
- films/videos

Learning outcome

The learner will:

4. Be able to use browser software to communicate information online.

Assessment criteria

The learner can:

- 4.1 select and use appropriate **tools and techniques** to communicate information online
- 4.2 use **browser** tools to **share** information sources with others
- 4.3 **submit** information online
- 4.4 identify opportunities to create, post or publish material to **social media websites.**

Range**Tools and techniques:**

- email
- social media eg
 - Facebook
 - Twitter
 - Google +
 - Pinterest
- video conferencing
- instant messaging services

Browsers:

- Google chrome
- Internet Explorer
- Safari
- Firefox

Sharing:

- sharing extensions
- social media links
- email links

Submit:

- Status updates
- Tweets

- Photo sharing

Social media websites:

- Facebook
- Twitter
- Google+
- Pinterest

Learning outcome

The learner will:

5. Understand the need for safety and security practices.

Assessment criteria

The learner can:

- 5.1 describe the **danger of computer viruses** and how to minimise risks
- 5.2 describe how to minimise **threats to information security** when online
- 5.3 describe how to minimise the **threats to user safety** when online
- 5.4 describe where to access online help and information when using social media networks.

Range

Danger of computer viruses:

- bad websites
- email attachments
- removable storage
- downloading files

Threats to information security:

- phishing
- pharming
- hacking
- malware

Threats to user safety:

- grooming
- stalking
- cyber bullying

Unit 247 Payroll processing

UAN	T/505/1238
Level:	2
Credit value:	5
GLH:	20
Aim	The aim of this unit is for the learner to have the skills necessary to be able to process the payroll for income tax and National Insurance contributions.

Learning outcome

The learner will:

1. Be able to use HMRC approved tools to calculate income tax.

Assessment criteria

The learner can:

- 1.1 apply the tax code for an employee from given information
- 1.2 process pre-tax deductions correctly
- 1.3 process accurately a variety of Tax Codes using HMRC approved tools:
 - a. standard suffix codes operated on a cumulative or noncumulative basis
 - b. BR code operated on a cumulative basis
 - c. NT
 - d. OT
 - e. D0
 - f. D1
- 1.4 identify the authority required to change an employee's tax code and process the change accurately.

Assessment Guidance

Evidence may be supplied by:

- observation
- witness testimony
- professional discussion
- questioning
- product
- reflective account

Learning outcome
The learner will: 2. Be able to determine national insurance contributions to be deducted from gross pay.
Assessment criteria
The learner can: 2.1 process accurately for NI categories A, C and D, using approved HMRC Tools: <ul style="list-style-type: none"> a. employee NI Contributions b. employer NI Contributions.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • product

Learning outcome
The learner will: 3. Be able to determine voluntary deductions and non-standard statutory deductions.
Assessment criteria
The learner can: 3.1 process voluntary deductions in an appropriate way 3.2 process other statutory deductions: <ul style="list-style-type: none"> a. deductions from earnings orders b. Scottish arrestment orders c. student loan repayments.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • product

Learning outcome
The learner will: 4. Be able to produce relevant pay period reports.
Assessment criteria
The learner can: 4.1 produce a P11 or equivalent 4.2 produce payslips or equivalent, to detail statutory, non-statutory and organisational information regarding employees' individual pay 4.3 produce payment schedules for different methods of making payments to employees.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • product

Learning outcome
The learner will: 5. Be able to record and reconcile payments and deductions to employees and external agencies.
Assessment criteria
The learner can: 5.1 produce an internal payroll summary to record and itemise payments and deductions, including employer's NIC 5.2 reconcile payments and deductions made from employees pay with the total payroll 5.3 prepare Employer Payment Summaries in line with the tax authority's requirements.

Assessment Guidance
Evidence may be supplied by: <ul style="list-style-type: none"> • observation • witness testimony • professional discussion • product.

Unit 273/680 Principles of equality and diversity in the workplace

UAN	J/506/1806
Level:	2
Credit value:	2
GLH:	10
Assessment type:	E-volve or Portfolio of evidence
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LBA7 Promote equality of opportunity, diversity and inclusion
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ).
Aim	This unit aims to develop knowledge and understanding regarding equality and diversity, and will introduce learners to the key principles underpinning equality and diversity in the workplace. Upon completion of this unit, learners will understand the implications of equality legislation and will understand organisational standards and expectations for equality and diversity in the workplace.

Learning outcome
The learner will: 1. Understand the implications of equality legislation.
Assessment criteria
The learner can: 1.1 define the concept 'equality and diversity' 1.2 describe the legal requirements for equality of opportunity 1.3 describe the role and powers of organisations responsible for equality 1.4 explain the benefits of equal opportunities and diversity 1.5 explain the potential consequences for an organisation of failing to comply with equality legislation.

Assessment Guidance

1.1

- You are required to state precisely the meaning of both quality and diversity ensuring the difference between the two is made clear.

1.2

The Equality Act 2010 legally protects people from discrimination and helps achieve equal opportunities in the workplace and in wider society

- It replaced previous anti-discrimination laws with a single Act, making the law easier to understand and strengthening protection in some situations
 - It sets out the different ways in which it's unlawful to treat someone.
- You are required to describe the legal requirements for equality of opportunity as set out in the Equality Act 2010.

1.3

The Equality and Human Rights Commission (EHRC) has 'a statutory remit to promote and monitor human rights; and to protect, enforce and promote equality across the nine "protected" grounds - age, disability, gender, race, religion and belief, pregnancy and maternity, marriage and civil partnership, sexual orientation and gender reassignment'

The Commission has responsibility for the promotion and enforcement of equality and non-discrimination laws in England, Scotland and Wales

In Northern Ireland, there is a separate Equality Commission (ECNI) and a Human Rights Commission (NIHRC)

- You are required to describe the role and powers of the EHRC, the ECNI, or the NIHRC, as appropriate.

1.4

- You are required to provide two or more examples to show how 'diversity management' and promoting 'equality of opportunity' work to benefit an organisation in terms of improving productivity, raising the profile of the organisation, entering new markets, or widening the pool of talent available for promotion.

1.5

The Legal Enforcement Powers available to the EHRC are Inquiries, Investigations, Unlawful Act notices, Agreements, Public Sector Duty Assessments and Compliance notices.

- In order to pass this criterion an explanation of each of the following must be provided:
 - Inquiries
 - Investigations
 - Unlawful Act Notices
 - Agreements
 - Public Sector Duty Assessments
 - Compliance notices

Learning outcome

The learner will:

2. Understand organisational standards and expectations for equality and diversity and context in the workplace.

Assessment criteria

The learner can:

- 2.1 explain how organisational policies on equality and diversity translate into day to day activity in the workplace
- 2.2 describe their own responsibilities for equality and diversity in the workplace
- 2.3 describe behaviours that support equality, diversity and inclusion in the workplace.

Assessment Guidance**2.1**

Organisations should demonstrate good practice by having a written statement on equality and diversity, and this may be called a 'policy', a 'strategy', or something similar

The policy is a statement of intent to guide decision making, and how this intent is carried out in practice, in day-to-day operations, will be stated in relevant organisational procedures

- You are required to explain how equality and diversity is essential to two or more organisational procedures.

2.2

Employees are responsible for supporting the aims of their organisation's equality and diversity policies and for conforming to organisational procedures, and responsibilities for equality and diversity in the workplace will generally be specified in these documents.

- You are required to describe two or more of your responsibilities for equality and diversity in the workplace, in accordance with your organisation's policies and procedures.

2.3

Organisations expect high standards of behaviour from employees, and all employees need to be aware how their behaviour can affect others.

Discriminatory behaviour is not acceptable, and all employees should treat others with courtesy, respect and consideration.

- You are required to describe three or more behaviours, or ways in which employees interact with each other, which support equality, diversity and inclusivity in the workplace.

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research on the range stated in each of the above learning outcomes.

Candidates will be required to submit a report of a minimum of 2000 words to a maximum of 3500 words, to include the following:

- the meaning of both equality and diversity ensuring the difference between the two is made clear.
- the legal requirements for equality of opportunity as set out in the Equality Act 2010.
- the role and powers of the EHRC, the ECNI, or the NIHR, as appropriate.
- how 'diversity management' and promoting 'equality of opportunity' work to benefit an organisation in terms of improving productivity, raising the profile of the organisation, entering new markets, or widening the pool of talent available for promotion.
- explanation of each of the following:
 - Inquiries
 - Investigations
 - Unlawful Act Notices
 - Agreements
 - Public Sector Duty Assessments
 - Compliance notices
- how equality and diversity is essential to organisational procedures.
- description of your responsibilities for equality and diversity in the workplace, in accordance with your organisation's policies and procedures.
- description of behaviours, or ways in which employees interact with each other, which support equality, diversity and inclusivity in the workplace.

Any necessary additional coverage could be generated through professional discussion.

Unit 274 Understand the safe use of online and social media platforms

UAN	L/505/3514
Level:	2
Credit value:	4
GLH:	35

Learning outcome
The learner will: 1. Understand that information stored on personal computers and mobile devices must be safeguarded.
Assessment criteria
The learner can: 1.1 identify the potential risks to information security of using personal computers and mobile devices for: a. using email b. web browsing c. banking online d. shopping online e. social networking 1.2 describe the security risks associated with: a. hardware b. software c. social media networking d. access to malicious websites e. access to inappropriate material published on the Internet f. corrupted or infected email attachments 1.3 explain the importance of controlling access to hardware, software and stored data 1.4 describe the common types of scams and frauds: a. phishing b. pharming c. hacking 1.5 explain the importance of developing and maintaining safe ICT user habits.

Range
<p>Potential risks:</p> <ul style="list-style-type: none"> • malicious software (malware) • identity theft • corporate espionage • hacking • fraud <p>Security risk:</p> <ul style="list-style-type: none"> • insecure physical access • removable storage media • counterfeit third party hardware • backdoors, trap doors and time bombs • personal safety risks <ul style="list-style-type: none"> ○ mugging shoulder surfing, handbag dipping, grooming, cyber bullying • spoofing • phishing

Learning outcome
<p>The learner will:</p> <p>2. Know how to select and use appropriate security methods to safeguard systems and data.</p>
Assessment criteria
<p>The learner can:</p> <p>2.1 describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords</p> <p>2.2 describe common ways of controlling access to hardware, software and data</p> <p>2.3 identify ways to protect data and software</p> <p>2.4 describe the term 'virus' and give examples of different types</p> <p>2.5 describe the purpose of anti-virus software</p> <p>2.6 explain why anti-virus software should be regularly updated</p> <p>2.7 explain the importance of backing up and safely storing data.</p>

Range
<p>Techniques/measures:</p> <ul style="list-style-type: none"> • biometrix • key fobs • swipe cards • time code devices • CAPTCHA <p>Common ways:</p> <ul style="list-style-type: none"> • login identity

- passwords
- swipe cards
- key and lock
- file permissions

Different types:

- Worms
- Trojans
- Keylogger
- Spyware
- Ransomware

Learning outcome

The learner will:

3. Understand the threats to personal safety when using the Internet.

Assessment criteria

The learner can:

3.1 describe the forms and features of:

- cyberbullying
- grooming
- stalking
- criminal activities
- inappropriate contact
- inappropriate content

3.2 identify when and how to report online safety issues 3.3

describe the risks and consequences of:

- identity theft
- identity fraud

3.3 describe how user accounts can be used as a security measure when computers are used by more than one person

3.4 explain the importance of setting parental controls on personal computers, mobile and media devices

3.5 explain how to set up **parental controls** on:

- personal computers
- tablets
- mobile phones.

Range
Parental controls: <ul style="list-style-type: none"> • restricting access to websites • restricting access to age sensitive media • restricting access to inappropriate words in media • enabling parental authorisation for purchases • service provider controls

Learning outcome
The learner will: 4. Know how to protect their online devices against fraud and security attacks.
Assessment criteria
The learner can: 4.1 set up security measures to protect their personal computers and mobile devices against fraud and security threats 4.2 describe measures that can help to protect their personal information 4.3 describe the risks posed by unsolicited email and measures that can reduce the risks 4.4 identify the security threats when accessing public WiFi networks.

Range
Security measures: <ul style="list-style-type: none"> • access passwords • anti-virus software • device encryption • network settings • device tracking Unsolicited email (spam): <ul style="list-style-type: none"> • advertising, eg pornography, dating, gambling • get rich quick and work from home schemes • hoax virus warnings • hoax charity appeals • chain emails which encourage you to forward them to multiple contacts

Learning outcome
The learner will: 5. Understand the implications of entering personal information onto social media networking sites.
Assessment criteria
The learner can: 5.1 explain the concept of no 'take backs' once information is posted online 5.2 identify who can view information posted onto social media networking websites 5.3 explain the privacy issues of using social media websites 5.4 describe formal and informal conventions, or netiquette , which should be observed when communicating online 5.5 describe the potential consequences of posting their personal information onto social media websites 5.6 identify the security risks of adding geographic identity or location to material they upload to the Internet.

Range
<p>Who:</p> <ul style="list-style-type: none"> • potential employers • current employers • suppliers • competitors • recruiters <p>Netiquette:</p> <ul style="list-style-type: none"> • refraining from profanity • not posting copy righted material • staying on topic in a discussion forum • not using upper case to shout <p>Potential consequences:</p> <ul style="list-style-type: none"> • grooming • loss of employment • identity theft <p>Security risks:</p> <ul style="list-style-type: none"> • risk from burglary • stalking • cyber stalking

Learning outcome

The learner will:

6. Understand legal measures that address the protection of data.

Assessment criteria

The learner can:

6.1 identify relevant legislation and guidelines relating to

- a. downloading images and files from the Internet
- b. data protection

6.2 identify data protection issues around the use of social media 6.3

6.3 describe what is meant by the following terms:

- a. copyright
- b. plagiarism
- c. intellectual property

6.4 explain why organisations develop and adopt policies for the acceptable use of ICT

6.5 describe the **common components** of an Acceptable Use Policy.

Range**Common components:**

- systems covered by the policy
- people covered by policy
- timeframe when policy is enforced
- location where policy applied eg mobile/home working possible sanctions.



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**.

Centre Manual - Supporting Customer Excellence 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, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

The centre and qualification approval process

- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006) and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

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 on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF):** general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs

- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

Useful contacts

UK learners General qualification information	E: learnersupport@cityandguilds.com
International learners General qualification information	F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	F: +44 (0)20 7294 2413 E: intops@cityandguilds.com
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	F: +44 (0)20 7294 2413 E: walledgarden@cityandguilds.com
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: business@cityandguilds.com
Publications Logbooks, Centre documents, Forms, Free literature	F: +44 (0)20 7294 2413

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