Units contributing to

City & Guilds Level 4

Award, Certificate, Diploma and Extended Diploma in Leadership and Management (8605)

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| Title: | | **Understanding innovation and change in an organisation** | | |
| Level: | | **3** | | |
| Credit value: | | **2** | | |
| Unit guided learning hours | | **9** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand innovation and change in an organisation | | | 1.1  1.2  1.3 | Explain the benefits of innovation and change for the organisation  Identify the barriers to change and innovation in the organisation  Explain practical ways of overcoming these barriers |
| 1. Understand how to plan, monitor and review the implementation and communication of innovation and change in an organisation | | | 2.1  2.2 | Describe which planning, monitoring and review techniques could be used to manage innovation and change  Explain why communication is important in successful implementation of innovation and change |
| 1. Understand the effects of innovation and change on people and teams in an organisation | | | 3.1 | Explain possible human effects of innovation and change upon people and teams in an organisation |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop knowledge and understanding of innovation and change as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: C2, C5, C6 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M3.02 – Understanding change in the workplace | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * The benefits of change and the consequences of not changing * The role of change in the survival and prosperity of organisations * Concepts of creativity and innovation and their significance for organisational success and change management * Barriers to change and innovation – how to identify them and other difficulties in implementing change * Means of overcoming barriers and difficulties including unfreezing and freezing techniques | | | |
| 2 | * Methods to monitor and control progress of innovation and change against plan, including use of Gantt charts, network planning * The role of communication in successful implementation of innovation and change | | | |
| 3 | * Change fatigue and its adverse effects * Ways to organise and co-ordinate resources and activities to achieve planned innovation and change * Direct and indirect aspects of innovation and change – human and financial effects upon other people, departments and organisations | | | |

**Assignment Task for Unit: Understanding innovation and change in an organisation**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of innovation and change as required by a practising or potential first line manager.  In order to demonstrate your knowledge of this you need to respond to all of the questions listed below.  **NOTE:**  *You may want to relate your answers to an organisation that you work in. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 11 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1000 words: the suggested range is between 800 and 1500 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Benefits of change and innovation**  Explain what you see as the benefits of innovation and change in an organisation.  **Barriers to change and innovation**  Identify the barriers to change and innovation in the workplace.  **Overcoming barriers to change and innovation**  Explain what practical ways there are to overcoming the barriers you have identified in your answer to the previous question. | | * + Explain the benefits of innovation and change for the organisation *(20 marks)*   + Identify the barriers to change and innovation in the organisation *(20 marks)*   + Explain practical ways of overcoming these barriers *(12 marks)* |

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| **Planning, monitoring review techniques**  Describe which :   * + Planning   + Monitoring   + Review   Techniques could be used to manage change and innovation in an organisation.  **The importance of communication in change and innovation**  Explain why communication is important to ensure change and innovation is successful in an organisation. | * + Describe which planning, monitoring and review techniques could be used to manage innovation and change *(24 marks)*   + Explain why communication is important in successful implementation of innovation and change *(12 marks)* |
| **The human effects of change and innovation**  Explain what the possible effects of change and innovation are on people and teams in an organisation. | * + Explain possible human effects of innovation and change upon people and teams in an organisation *(12 marks)* |
| **By submitting I confirm that this assignment is my own work** | |

**MARK SHEET – Understanding innovation and change in an organisation**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Understand innovation and change in an organisation | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Explained the benefits of innovation and change for the organisation | **Referral [ca. 5/20]** | | **Pass [10/20]** | | **Good Pass [ca. 15/20]** | | |  | |
| * The benefits of innovation and change for the organisation are not explained or are merely listed or described, or only one benefit is explained | | * Two or more appropriate benefits of innovation and change for the organisation are explained although the explanations may lack detail | | * Two or more appropriate benefits of innovation and change for the organisation are fully explained | | |
| / 20  (min. of 10) | Pass or Referral |
| AC 1.2  Identified the barriers to change and innovation in the organisation | **Referral [ca. 5/20]** | | **Pass [10/20]** | | **Good Pass [ca. 15/20]** | | | **Assessor feedback on AC** | |
| * The barriers to change and innovation in the organisation are not identified or are merely listed, or only one barrier is identified | | * Two or more appropriate barriers to change and innovation in the organisation are briefly identified | | * Two or more appropriate barriers to change and innovation in the organisation are identified and stated in detail | | |  | |
| / 20  (min. of 10) | Pass or Referral |

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| AC 1.3  Explained practical ways of overcoming these barriers | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * Practical ways of overcoming the identified barriers are not explained or are merely listed or described, or only one practical way is explained, or the ways of overcoming the identified barriers are impractical. | * Practical ways of overcoming the two or more identified barriers are explained although the various suggested ways are similar in nature | | * Practical ways of overcoming the two or more identified barriers are explained and the various suggested ways are different in nature |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |
| **Learning Outcome / Section 2:** Understand how to plan, monitor and review the implementation and communication of innovation and change in an organisation | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | **Assessor feedback on AC** | |
| AC 2.1  Described which planning, monitoring and review techniques could be used to manage innovation and change | **Referral [ca. 6/24]** | **Pass [12/24]** | | **Good Pass [ca. 18/24]** |  | |
| * Less than two planning, monitoring and review techniques which could be used to manage innovation and change are given or, if given, are merely listed or identified as opposed to described | * At least two planning, monitoring and review techniques which could be used to manage innovation and change are described although their principle features may be incomplete | | * Several planning, monitoring and review techniques which could be used to manage innovation and change are fully described in detail, distinguishing between monitoring and review and/or between innovation and change |
| / 24  (min. of 12) | Pass or Referral |
| AC 2.2  Explained why communication is important in successful implementation of innovation and change | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * Why communication is important in successful implementation of innovation and change is discussed in general **but** is not explained | * Why communication is important in successful implementation of innovation and change is briefly explained | | * The importance of communication in the successful implementation of change is thoroughly explained in detail |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |

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| **Learning Outcome / Section 3:** Understand the effects of innovation and change on people and teams in an organisation | | | | | | | | |
| **Assessment Criteria (AC)** | | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | **Assessor feedback on AC** | |
| AC 3.1  Explained possible human effects of innovation and change upon people and teams in an organisation | | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | |  | |
| * No explanation given of possible human effects of innovation and change upon people and teams in an organisation or, if given, the explanation is incorrect, minimal or inappropriate * Possible non-specific effects of innovation and change are explained **but** not human effects and/or not upon people and teams in an organisation * Only possible human effects upon people or only effects upon teams are explained, not both * Possible human effects of innovation and change upon people and teams in an organisation are merely listed or described, as opposed to explained | * Two or more possible human effects of innovation and change upon people, and two or more possible human effects of innovation and change upon teams in an organisation are explained although the explanations may lack detail | | * Several possible human effects of innovation and change upon people and several possible human effects of innovation and change upon teams in an organisation are fully explained in detail | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of Assessor:**  **Date:** | | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Planning change in the workplace** | | |
| Level: | | **3** | | |
| Credit value: | | **2** | | |
| Unit guided learning hours | | **9** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand the forces for change in an organisation | | | 1.1 | Identify the forces that may require own organisation to change by conducting a simple PESTLE or SWOT analysis |
| 1. Know how to identify and plan change in an organisation | | | 2.1  2.2  2.3  2.4 | Give an example of change required in the workplace reflecting the SWOT or PESTLE analysis  Identify relevant human and financial factors in the consideration of planning change within the context of the example given  Explain how to communicate with and involve people to facilitate effective change  Use a technique for planning change within the given context |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To be able to plan change in an organisation as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: C5, C6 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M3.03 – Planning change in the workplace | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * PESTLE analysis * Organisational SWOT analysis | | | |
| 2 | * The principles of change management * Methods of planning for change * Use of Gantt charts, network planning as tools for planning change * Identification of human and financial factors in the consideration of change * The importance of communication and involving people to facilitate effective change | | | |

**Assignment Task for Unit: Planning change in the workplace**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  Examine factors that may require your organisation to change, and identify a change required in the workplace that will benefit the organisation. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.  You should discuss the choice of topic and an outline of your submission with your line manager and/or your tutor. The choice of topic must allow you to demonstrate achievement of assessment criteria from the unit studied. It should not be a very large or complex topic, but it must offer scope for planning change – perhaps it is a change in working methods, customer service or working relationships.  **NOTE:**  *You should plan to spend approximately 10 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1000 words: the suggested range is between 800 and 1500 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Identify the forces for change in an organisation**  Identify factors that may require the organisation to change. | | * Identify the forces that may require own organisation to change by conducting a simple PESTLE or SWOT analysis *(20 marks)* |
| **Planning the change**  Based on these factors identify a change required in the workplace and explain the potential benefits of this change to the organisation. | | * Give an example of change required in the workplace reflecting the SWOT or PESTLE analysis *(28 marks)* |
| **Implications of the change**  Explain the possible financial effects of the change on the organisation.  Explain the possible effects on people in the organisation. | | * Identify relevant human and financial factors in the consideration of planning change within the context of the example given *(20 marks)* |
| **Communicating and implementing the change**  Describe who needs to know about the change, describe how you will communicate with them and explain why it is important to communicate the change to them.  Prepare an action plan for implementing the change. | | * Explain how to communicate with and involve people to facilitate effective change *(16 marks)* * Use a technique for planning change within the given context *(16 marks)* |
| **By submitting I confirm that this assignment is my own work** | | |

**MARK SHEET – Planning change in the workplace**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Understand the forces for change in an organisation | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Identify the forces that may require own organisation to change by conducting a simple PESTLE or SWOT analysis | **Referral [ca. 5/20]** | | **Pass [10/20]** | | | **Good Pass [ca. 15/20]** | | |  | |
| * A SWOT or PESTLE analysis is not found or, if given, is incomplete or incorrect * A SWOT or PESTLE is given **but** does not recognisably identify forces that may require change in the organisation **and/or** analyses the change itself rather than forces that may require change | | * A simple SWOT or PESTLE analysis is conducted (and is provided in the submission) that is complete and accurate **and** appropriately identifies forces that may require own organisation to change, although this identification may be more implicit than explicit | | | * A detailed and insightful SWOT and/or PESTLE analysis is given that is complete, accurate and is weighted * Forces are explicitly identified that may require own organisation to change * A wide range of different forces, both internal and external, is identified | | |
| / 20  (min. of 10) | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | |
| **Learning Outcome / Section 2:** Know how to identify and plan change in an organisation | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | **Assessor feedback on AC** | |

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| AC 2.1  Give an example of change required in the workplace reflecting the SWOT or PESTLE analysis | **Referral [ca. 7/28]** | **Pass [14/28]** | **Good Pass [ca. 21/28]** |  | |
| * No example is found of a change required in the workplace * An example is given **but** it is minimal or inappropriate and/ordoes not reflect the SWOT or PESTLE analysis | * The provided example of change required in the workplace is appropriate **and** clearly reflects the SWOT or PESTLE analysis | * A detailed example of required change in the workplace is given and is appropriate, realistic and is put into context * How the example was derived from an analysis of the SWOT and/or PESTLE model is described |
| / 28  (min. of 14) | Pass or Referral |
| AC 2.2  Identify relevant human and financial factors in the consideration of planning change within the context of the example given | **Referral [ca. 5/20]** | **Pass [10/20]** | **Good Pass [ca. 15/20]** | **Assessor feedback on AC** | |
| * Human and financial factors in the consideration of planning change are not recognisably identified or, if identified, are incomplete or unclear * Human **or** financial factors are identified **but** not both | * In the consideration of planning change within the context of the example given for the last AC, at least two human **and** at least two financial factors are briefly identified | * Both human **and** financial factors in the consideration of planning change are identified in detail * Several human **and** several financial factors are described and quantified in detail |  | |
| / 20  (min. of 10) | Pass or Referral |
| AC 2.3  Explain how to communicate with and involve people to facilitate effective change | **Referral [ca. 4/16]** | **Pass [8/16]** | **Good Pass [ca. 12/16]** | **Assessor feedback on AC** | |
| * Nothing is given on how to communicate with and involve people in order to facilitate effective change * A way is explained but is minimal, inappropriate or is merely stated, as opposed to explained | * A explanation is given of how to communicate with **and** involve people in order to facilitate effective change, although the description may be limited | * Methods of both communicating with and involving people are explained in detail and the ways in which they facilitate effective change are made explicit and clear |  | |
| / 16  (min. of 8) | Pass or Referral |

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| AC 2.4  Use a technique for planning change within the given context | **Referral [ca. 4/16]** | | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | | **Assessor feedback on AC** | |
| * No evidence of a technique for planning change having been used and no recognisable plan is provided * Evidence is given of the use of a planning technique **but t**he produced plan is minimal, incorrect or inappropriate and/orthe planned change has nothing to do withthat identified for AC 2.1 | | * A plan is given, using a recognised technique for planning change (e.g. Gantt chart or network planning) within the context identified for AC 2.1, although the technique may be simple and/or the produced plan may be limited | | * Detailed evidence is given of the application of a technique for planning change and a step-by-step explanation of how it was used for planning change within the given context | |  | |
| / 16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Giving briefings and making presentations** | | |
| Level: | | **3** | | |
| Credit value: | | **2** | | |
| Unit guided learning hours | | **4** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Be able to plan a briefing or presentation | | | 1.1  1.2 | Identify appropriate information in line with the objectives of the briefing or presentation  Prepare a plan for the content of the briefing or presentation |
| 1. Be able to conduct a briefing or presentation | | | 2.1  2.2  2.3  2.4 | Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation  Present information clearly and logically  Present information within agreed time limits  Respond to questions raised accurately and clearly |
| 1. Be able to evaluate a briefing or presentation | | | 3.1  3.2 | Design a simple evaluation form to gather feedback on briefing or presentation  Use feedback to identify areas for improvement in presentation skills |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | The learner will be able to give a briefing and make a presentation in the workplace as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: E11 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | |  | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Selection of relevant information content * How to plan and prepare effectively for briefings (account for Purpose; Audience; Content; Form) * The value of various methods of data presentation – tables, graphs, charts, diagrams * Prepare visual aids to support briefing or presentation | | | |
| 2 | * Formal and informal presentation skills including platform techniques and visual aids * Use of feedback to check understanding | | | |
| 3 | * How to evaluate briefings/presentations | | | |

**Assignment Task for Unit: Giving briefings and making presentations**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop your skills in giving presentations and briefings.  The task requires you to plan and deliver a briefing or presentation on a management topic of your choice, evaluate the effectiveness of your presentation and to use the feedback gathered to identify areas for improvement. It is recommended that you follow the stages in the process as set out below.  NOTE  *As part of the assignment you must prepare copies of support materials including your plan, a summary of your presentation and copies of all presentation material. Copies of the evaluation forms, a summary of the feedback gathered and action points for improvement are also required.*  *If the content of another unit is used as the topic of the briefing / presentation, then the assessment criteria for both units apply.*  *You may want to relate your answers to an organisation that you work in. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 12 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The presentation is likely to last no less than 5 minutes or more than 10 minutes.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Be able to plan a briefing or presentation**  Complete the following when preparing your presentation:   * Select and agree a topic for your presentation. This should be a management related topic. * Identify the objective of your presentation, for example, are you giving the audience some information, gaining their opinion or attempting to persuade. * Research and gather information to form the basis of your presentation. * Prepare an outline plan for your presentation including the order in which you will present your material and the timing. * Use suitable techniques such as Power point, to prepare visual aids to help your audience to understand the content of the presentation and to support your purpose. * Design a suitable evaluation form to gather feedback on your presentation. | | * Identify appropriate information in line with the objectives of the briefing or presentation *(16 marks)* * Prepare a plan for the content of the briefing or presentation *(12 marks)* |
| **Be able to conduct a briefing or presentation**  Complete the following when conducting your presentation:   * Deliver your presentation using your supporting material in a clear and logical manner. * Complete your presentation within the agreed time limits. * Check understanding of your presentation by asking for and responding to questions from your audience. | | * Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation *(12 marks)* * Present information clearly and logically *(20 marks)* * Present information within agreed time limits *(4 marks)* * Respond to questions raised accurately and clearly *(12 marks)* |
| **Be able to evaluate a briefing or presentation**  Complete the following when evaluating your presentation:   * Gather feedback on the presentation by circulating your evaluation form to the audience. * Use the feedback from the questionnaire to identify areas for improvement. * Reflect on and summarise those areas for improvement. | | * Design a simple evaluation form to gather feedback on briefing or presentation *(8 marks)* * Use feedback to identify areas for improvement in presentation skills *(16 marks)* |
| **By submitting I confirm that this assignment is my own work** | | |

**MARK SHEET – Giving briefings and making presentations**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Be able to plan a briefing or presentation | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Identify appropriate information in line with the objectives of the briefing or presentation | **Referral [ca. 4/16]** | | **Pass [8/16]** | | | | **Good Pass [ca. 12/16]** | |  | |
| * No information is found * Information is given **but** is minimal or is not in line with the objectives of the briefing or presentation | | * Appropriate information in line with the objectives of the briefing or presentation is identified | | | | * Substantial information that is appropriate and in line with the objectives of the briefing or presentation is identified and the objectives are outlined to clarify the alignment | |
| / 16  (min. of 8) | Pass or Referral |
| AC 1.2  Prepare a plan for the content of the briefing or presentation | **Referral [ca. 3/12]** | | **Pass [6/12]** | | | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * No plan is provided for the content of the briefing or presentation * A plan is given for the content of the briefing or presentation **but** it is minimal or inappropriate | | * A plan for the content of the briefing or presentation is prepared although the plan may be limited | | | | * A thorough and detailed plan for the content of the briefing or presentation is submitted | |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | |
| **Learning Outcome / Section 2:** Be able to conduct a briefing or presentation | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | **Assessor feedback on AC** | |
| AC 2.1  Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation | **Referral [ca. 3/12]** | | **Pass [6/12]** | | | | **Good Pass [ca. 9/12]** | |  | |
| * No evidence is given of the use of appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation * Evidence is given of the use of only one appropriate presentation technique and aids to enhance understanding of the topic of briefing or presentation * Evidence is given of the use of at least two appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation **but** the evidence is minimal or inappropriate and/or the techniques and aids do not have the potential to enhance understanding | | * Evidence is given of the use of at least two appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation | | | | * Ample evidence is given detailing the use of several appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation, clarifying how the techniques and aids helped | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.2  Present information clearly and logically | **Referral [ca. 5/20]** | | **Pass [10/20]** | | | | **Good Pass [ca. 15/20]** | | **Assessor feedback on AC** | |
| * No evidence is given of information presented clearly and logically * Evidence is given of information presented **but** the evidence is inappropriate or minimal and/or the information is not clear and logical * Evidence is given of information presented either clearly or logically, but not both | | * Evidence is given of information presented both clearly **and** logically | | | | * Ample detailed evidence is given of information presented both clearly and logically | |  | |
| / 20  (min. of 10) | Pass or Referral |
| AC 2.3  Present information within agreed time limits | **Referral [ca. 1/4]** | | **Pass [2/4]** | | | | **Good Pass [ca. 3/4]** | | **Assessor feedback on AC** | |
| * No evidence is given of information presented within agreed time limits * Evidence is given of information presented within agreed time limits but the evidence is inappropriate or minimal | | * Evidence is given of information presented within agreed time limits | | | | * Ample detailed evidence is given of information presented within agreed time limits | |  | |
| / 4  (min. of 2) | Pass or Referral |

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| AC 2.4  Respond to questions raised accurately and clearly | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * No evidence is provided of accurate and clear responses to questions raised * Evidence is provided of only one accurate and clear response to questions raised * Evidence is provided of at least two responses to questions raised **but** the evidence is inappropriate or minimal and/or the evidenced responses are inaccurate or unclear | | * Evidence is provided of two or more accurate and clear responses to questions raised | | * Ample evidence is submitted of a range of accurate and clear responses to questions raised | |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
| **Learning Outcome / Section 3:** Be able to evaluate a briefing or presentation | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | **Assessor feedback on AC** | |
| AC 3.1  Design a simple evaluation form to gather feedback on briefing or presentation | **Referral [ca. 2/8]** | | **Pass [4/8]** | | **Good Pass [ca. 6/8]** | |  | |
| * No evidence is given of the design of a simple evaluation form to gather feedback on briefing or presentation * A form is given **but** it is unsuitable to gather feedback on briefing or presentation and/or inappropriate for evaluation | | * A form is given that, although it may be simple and limited, is appropriately designed to effectively gather feedback on the presentation for the purpose of evaluation | | * A form is submitted that is appropriately designed to effectively gather a range of detailed feedback on the presentation to enable a thorough evaluation | |
| / 8  (min. of 4) | Pass or Referral |
| AC 3.2  Use feedback to identify areas for improvement in presentation skills | **Referral [ca. 4/16]** | | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | | **Assessor feedback on AC** | |
| * Only one area for improvement in presentation skills is identified * At least two areas for improvement in presentation skills are identified **but** they are based on self-assessment and/or there is no evidence on their being based on feedback * At least two areas for improvement in presentation skills are identified **but** the identified areas for improvement are inappropriate and/or show no relation to the feedback | | * At least two areas for improvement in presentation skills are identified **and** * the areas for improvement are based on evidence from feedback that is quoted, although the feedback may be limited | | * Several areas for improvement in presentation skills are identified in detail **and** * the areas for improvement are clearly and based on a range of detailed feedback with the link between the feedback and the identified areas made explicitly clear | |  | |
| / 16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Managing workplace projects** | | |
| Level: | | **3** | | |
| Credit value: | | **2** | | |
| Unit guided learning hours | | **7** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Know how to manage a simple workplace project | | | 1.1  1.2  1.3  1.4  1.5 | Identify a simple workplace project  Use a simple tool for determining the financial viability of the project  Produce a project plan using an appropriate project planning technique  Set objectives and targets/milestones to monitor performance and review plans within the project  Use a project evaluation technique to evaluate the project |
| 1. Understand the financial and non-financial implications of a workplace project | | | 2.1  2.2 | List areas where net savings can be achieved as a result of the workplace project  Identify wider non-financial implications that can result from the workplace project |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To enable the practicing and potential first line manager to manage workplace projects. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: F1 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M3.22 – Managing projects | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Basic project design principles * Simple tools for financial appraisal of projects * Project planning techniques (Gantt charts, Flow charts, Network planning) * Use of objectives and targets/milestones to monitor performance and review plans * Project evaluation and review techniques | | | |
| 2 | * Non-financial costs and benefits of change (social, environmental, human elements) | | | |

**Assignment Task for Unit: Managing workplace projects**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of managing workplace projects. The task requires you to manage a simple workplace project and to understand the costs and benefits resulting from the project.  **note:**  *You will need to relate your answers to an organisation that you work in****.*** *If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 10 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1500 words: the suggested range is between 1000 and 2000 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Know how to manage a simple workplace project**  Identify a simple workplace project including the agreeing and setting of SMART project objectives. You should provide a brief context statement to explain the background to and objectives of the project. The following tasks should be completed and presented in a logical manner with supporting explanations and copies of the documentation, such as GANTT charts, you have produced:   * Identify the tasks and resources needed to complete your project. * Use a simple tool to determine the financial viability of your project. * Plan the project using an appropriate project planning technique. * Set objectives and targets /milestones targets to monitor performance against plan and to review plans. * Explain which technique you will use to evaluate your project and how you will use it. | | * Identify a simple workplace project *(8 marks)* * Use a simple tool for determining the financial viability of the project *(20 marks)* * Produce a project plan using an appropriate project planning technique *(20 marks)* * Set objectives and targets/milestones to monitor performance and review plans within the project *(12 marks)* * Use a project evaluation technique to evaluate the project *(16 marks)* |

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| **Understand the financial and non-financial implications of a workplace project**  Look at the implications of your project and prepare a reflective summary that covers these assessment criteria. | * List areas where net savings can be achieved as a result of the workplace project *(12 marks)* * Identify wider non-financial implications that can result from the workplace project *(12 marks)* |
| **By submitting I confirm that this assignment is my own work** | |

**MARK SHEET – Managing workplace projects**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Know how to manage a simple workplace project | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Identify a simple workplace project | **Referral [ca. 2/8]** | | **Pass [4/8]** | | **Good Pass [ca. 6/8]** | | |  | |
| * A simple workplace project is not identified * A workplace project is identified but which is too complex to enable the unit’s assessment criteria to be realistically achieved * The identified project to too simple, basically just a task | | * A simple workplace project is identified and briefly stated | | * A simple workplace project is identified and stated in detail | | |
| / 8  (min. of 4) | Pass or Referral |
| AC 1.2  Use a simple tool for determining the financial viability of the project | **Referral [ca. 5/20]** | | **Pass [10/20]** | | **Good Pass [ca. 15/20]** | | | **Assessor feedback on AC** | |
| * A simple tool for determining the financial viability of the project is not used * The simple tool used does not adequately determine the financial viability of the project or calculations are inaccurate | | * A simple tool for determining the financial viability of the project is used showing correct basic calculations | | * A simple tool for determining the financial viability of the project is used showing correct calculations and justified figures | | |  | |
| / 20  (min. of 10) | Pass or Referral |

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| AC 1.3  Produce a project plan using an appropriate project planning technique | **Referral [ca. 5/20]** | **Pass [10/20]** | | **Good Pass [ca. 15/20]** | **Assessor feedback on AC** | |
| * A project plan using an appropriate project planning technique is produced **but** is minimal, incorrect or incomplete * The project planning technique used is not a recognised planning technique or is incorrectly applied | * A project plan using an appropriate project planning technique is correctly produced which includes timescales and responsibilities, although it may be simplistic | | * A detailed project plan using an appropriate project planning technique is produced which includes timescales, resources, costs, and responsibilities |  | |
| / 20  (min. of 10) | Pass or Referral |
| AC 1.4  Set objectives and targets/milestones to monitor performance and review plans within the project | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * Objectives and/or targets/milestones to monitor performance and review plans within the project are not formed and stated * Only one objective and/or only one target/milestone to monitor performance and review plans within the project is stated | * Two or more objectives and two or more targets/milestones to monitor performance and review plans within the project are formed although the stated objectives may not be SMART and the targets/milestones may not comprehensively cover the whole project | | * Several objectives and a range of targets/milestones to monitor performance and review plans within the project are formed * The stated objectives are in SMART terms and the range of targets/milestones comprehensively cover the whole project |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.5  Use a project evaluation technique to evaluate the project | **Referral [ca. 4/16]** | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | **Assessor feedback on AC** | |
| * No evidence is provided that a recognised project evaluation technique is used to evaluate the project * A recognised project evaluation technique to evaluate the project is used but no conclusions are drawn and/or no recommendations are made | * Evidence is provided that a recognised project evaluation technique is used to evaluate the project although the conclusions drawn and/or recommendations made may be simplistic | | * Evidence is provided that a recognised project evaluation technique is used to thoroughly evaluate the project which draws clear and detailed conclusions and presents full and realistic recommendations |  | |
| / 16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |

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| **Learning Outcome / Section 2:** Understand the financial and non-financial implications of a workplace project | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | **Assessor feedback on AC** | |
| AC 2.1  List areas where net savings can be achieved as a result of the workplace project | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | |  | |
| * Areas where net savings can be achieved as a result of the workplace project are not listed * Only one area where net savings can be achieved is listed * The areas listed do not appear to relate to net savings or are not recognisably as a result of the project | | * Two or more areas where net savings can be achieved as a result of the workplace project are listed | | * Several areas where net savings can be achieved as a result of the workplace project are listed | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.2  Identify wider non-financial implications that can result from the workplace project | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * Wider non-financial implications that can result from the workplace project are not identified * Only one wider non-financial implication is identified and stated * Wider non-financial implications are identified **but** do not recognisably result from the workplace project | | * Two or more wider non-financial implications that can result from the workplace project are identified although they may be similar in nature | | * Several dissimilar wider non-financial implications that can result from the workplace project are identified | |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Understanding costs and budgets in an organisation** | | |
| Level: | | **3** | | |
| Credit value: | | **1** | | |
| Unit guided learning hours | | **7** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand budgets within an organisation | | | 1.1  1.2  1.3  1.4 | Explain the importance of agreeing to a budget and operating within it  Describe the process by which a budget is agreed in an organisation  Explain the process of gathering information to be used for the determination and/or revision of budgets  Describe a method to monitor variance between actual and budgeted performance |
| 1. Understand costs within an organisation | | | 2.1  2.2  2.3  2.4  2.5 | Explain fixed and variable costs in relation to the organisation  Explain the concept of break even in relation to the organisation  Explain the purpose and nature of basic cost statements  Explain the value of standard costing and its role as a control mechanism  Describe mechanisms in the organisation to maintain control of costs |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop knowledge and understanding of costs and budgets in an organisation as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: E1 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M3.27 - Working with costs and budgets | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * The nature and purpose of budgets, and the advantages of budgetary control * Methods to monitor variance of actual performance against budget * Causes of variance, their significance and ways of reducing adverse effects * How to gather information for use in determining and/or revising budgets | | | |
| 2 | * Definition of fixed and variable costs; concept of break even, especially in relation to own organisation * The purpose and nature of basic cost statements; use of standard costs * Role of the manager in cost control * Mechanisms to maintain control of costs, and how to select the optimum method | | | |

**Assignment Task for Unit: Understanding costs and budgets in an organisation**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of costs and budgets in an organisation as required by a practising or potential manager.  In order to demonstrate your knowledge of this you need to respond to all of the questions listed below.  **NOTE:**  *You may want to relate your answers to an organisation that you work in. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 5 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1000 words: the suggested range is between 800 and 1500 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Working to budget**  Explain how budgetary and cost control helps managers to manage their teams more effectively. In your answer you should:   * Explain the process and importance of agreeing a budget and operating within it. * Describe how you (could) monitor variance between actual performance and budget. * Explain how you (could) gather information to be used in determining and/or revising budgets. | | * Explain the importance of agreeing to a budget and operating within it *(12 marks)* * Describe the process by which a budget is agreed in an organisation *(12 marks)* * Explain the process of gathering information to be used for the determination and/or revision of budgets *(12 marks)* * Describe a method to monitor variance between actual and budgeted performance *(8 marks)* |
| **Understanding costs in the organisation**  Explain costs within an organisation. In your answer you should:   * Explain the concepts of fixed and variable costs and break even. * Explain how basic cost statements and standard costs are used (or could be used) in the workplace, explaining their purpose and nature and how they are (or could be) used to control costs. | | * Explain fixed and variable costs in relation to the organisation *(12 marks)* * Explain the concept of break even in relation to the organisation *(12 marks)* * Explain the purpose and nature of basic cost statements *(8 marks)* * Explain the value of standard costing and its role as a control mechanism *(12 marks)* * Describe mechanisms in the organisation to maintain control of costs *(12 marks)* |
| **By submitting I confirm that this assignment is my own work** | | |

**MARK SHEET – Understanding costs and budgets in an organisation**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Understand budgets within an organisation | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Explain the importance of agreeing to a budget and operating within it | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | |  | |
| * The importance of agreeing to a budget and operating within it is merely stated as opposed to explained * An explanation is given of the importance of agreeing to a budget or operating within it but not both * An explanation is given of the importance of agreeing to a budget and operating within it but the explanation is incorrect or minimal | | * An explanation is given of both the importance of agreeing to a budget and of operating within it although the explanation may be limited | | * The importance of agreeing to a budget and operating within it are both thoroughly explained in detail | | |
| / 12  (min. of 6) | Pass or Referral |

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| AC 1.2  Describe the process by which a budget is agreed in an organisation | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * The process by which a budget is agreed in an organisation is merely stated as opposed to described * A description is given of the process by which a budget is agreed in an organisation **but** it is incorrect, inappropriate or minimal | * A description is given of the process by which a budget is agreed in an organisation although the description may be limited | | * A thorough and detailed description is given of the step-by-step process by which a budget is agreed in an organisation |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.3  Explain the process of gathering information to be used for the determination and/or revision of budgets | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * The gathering of information to be used in determining and/or revising budgets is merely stated as opposed to described * The method of collecting budgetary information is explained in general **but** is not recognisably related to determining and/or revising budgets * An explanation is given of how information is gathered to be used in determining and/or revising budgets **but** the explanation is incorrect, inappropriate or minimal | * An explanation is given of how information is gathered for the purpose of determining and/or revising budgets although the explanation may be limited | | * A thorough and detailed explanation is given of the step-by-step process of collecting information in order to determine and/or revise budgets and how that information will be used is also made clear |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.4  Describe a method to monitor variance between actual and budgeted performance | **Referral [ca. 2/8]** | **Pass [4/8]** | | **Good Pass [ca. 6/8]** | **Assessor feedback on AC** | |
| * A method to monitor variance between actual and budgeted performance is merely stated as opposed to described * A way of monitoring variance between actual and budgeted performance is described **but** the description is incorrect, inappropriate or minimal | * A description is given of a method to monitor variance between actual and budgeted performance although the description may be limited | | * A method to monitor variance between actual and budgeted performance is thoroughly described in detail |  | |
| / 8  (min. of 4) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |

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| **Learning Outcome / Section 2:** Understand costs within an organisation | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | **Assessor feedback on AC** | |
| AC 2.1  Explain fixed and variable costs in relation to the organisation | **Referral [ca. 3/12]** | **Pass [6/12]** | **Good Pass [ca. 9/12]** |  | |
| * Fixed and variable costs in relation to the organisation are merely stated as opposed to explained * An explanation is given of fixed and variable costs in general **but** the costs have no recognisable relation to the organisation and/or the explanation is incorrect or minimal | * A correct explanation is given of fixed and variable costs in relation to the organisation although the explanation may be limited and the relationship to the organisation may be more implicit than explicit | * A thorough and detailed explanation is given of fixed and variable costs which is clearly and explicitly related to the organisation |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.2  Explain the concept of break even in relation to the organisation | **Referral [ca. 3/12]** | **Pass [6/12]** | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * The concept of break even in relation to the organisation is merely stated as opposed to explained * An explanation is given of the concept of break even in general but the concept has no recognisable relation to the organisation and/or the explanation is incorrect or minimal | * The concept of break even in relation to the organisation is correctly explained although the explanation may be limited and the relation to the organisation may be more implicit than explicit | * A thorough and detailed explanation is given of the concept of break even which is clearly and explicitly related to the organisation |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.3  Explain the purpose and nature of basic cost statements | **Referral [ca. 2/8]** | **Pass [4/8]** | **Good Pass [ca. 6/8]** | **Assessor feedback on AC** | |
| * The purpose and nature of basic cost statements are merely stated as opposed to explained * An explanation is given of the purpose and nature of basic cost statements but the explanation is incorrect or minimal | * An explanation is given of the purpose and nature of basic cost statements although the explanation may be limited | * A thorough and detailed explanation is given of the purpose and nature of basic cost statements |  | |
| / 8  (min. of 4) | Pass or Referral |

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|  | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| AC 2.4  Explain the value of standard costing and its role as a control mechanism | * The value of standard costing and its role as a control mechanism is merely stated as opposed to explained * An explanation is given of the value of standard costing and its role as a control mechanism but the explanation is incorrect or minimal * The value of standard costing is explained but its role as a control mechanism is not explained | | * An explanation is given of the value of standard costing and its role as a control mechanism although the explanation may be limited and the explanation of its role as a control mechanism may be more implicit than explicit | | * A thorough and detailed explanation is given of the value of standard costing and the explanation makes its role as a control mechanism explicitly clear | |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.5  Describe mechanisms in the organisation to maintain control of costs | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * Mechanisms in the organisation to maintain control of costs are stated or listed as opposed to described * A description is given of mechanisms to maintain control of costs but the description is incorrect, inappropriate or minimal and/or the mechanisms are not related to the organisation * Less than two mechanisms in the organisation to maintain control of costs are described | | * A description is given of at least two mechanisms specifically in the organisation to maintain control of costs although the description may be limited | | * A thorough and detailed description is given of several mechanisms specifically in the organisation to maintain control of costs | |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Understanding negotiation and networking in the workplace** | | |
| Level: | | **3** | | |
| Credit value: | | **1** | | |
| Unit guided learning hours | | **6** | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Know how to influence and negotiate with others to achieve objectives | | | 1.1  1.2  1.3 | Explain the general principles of negotiation  Explain a relevant technique for influencing others to achieve workplace objectives  Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations |
| 1. Understand the value of networking | | | 2.1  2.2  2.3 | Explain the value of networking  Identify an appropriate network for a manager in the workplace  Describe methods to establish and maintain effective professional relationships with the identified network |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop knowledge and understanding of negotiation and networking in the workplace as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2008 NOS: D1, D10 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M3.31 - Influencing others at work | |
| Location of the unit within the subject/sector classification system | | | 15.3 – Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Formal and informal negotiation * Negotiation strategy, tactics and behaviour * Non-verbal communication and social skills * Techniques for influencing others * Value systems and other barriers to acceptance * Conflict and its resolution to achieve a win-win situation * Levels of power and authority, and the impact on negotiation | | | |
| 2 | * Nature, purpose and value of networking * Identification of relevant networks * Effective networking practices and skills * Network and contact creation * Methods to establish and maintain effective professional relationships at various levels | | | |

**Assignment Task for Unit: Understanding negotiation and networking in the workplace**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of the techniques of negotiation and of the value of networking.  The first part of this task requires you to show your knowledge of the process of collaborative negotiation where those with differing objectives are able to reach a collaborative solution that is mutually acceptable. As part of that process you need to show your understanding of skills in influencing others through preparing a reasoned argument, emphasising the positive aspects of your case, remaining calm and assertive and listening to others to identify areas of common agreement. There are a range of situations in which negotiation skills can be used and you should select one which you have been or could be involved in and use this to illustrate the stages in the negotiation process. In describing the process you would follow and the approach you would take you should ensure that you have addressed all the assessment criteria in section one.  The second part of the task looks at another way in which you can influence others and achieve your objectives, in this case through developing a network of useful business or professional contacts both within your own organisation and outside. You need to explain the value of business networking and how you would set about creating such a network, covering the assessment criteria in section two.  **NOTE:**  *You may want to relate your answers to an organisation that you work in. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 6 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1000 words: the suggested range is between 800 and 1500 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the sub-headings shown below when structuring your Assignment* | | Assessment Criteria |
| **Know how to influence and negotiate with others to achieve objectives** | | * Explain the general principles of negotiation *(16 marks)* * Explain a relevant technique for influencing others to achieve workplace objectives *(20 marks)* * Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations *(16 marks)* |
| **Understand the value of networking** | | * Explain the value of networking *(16 marks)* * Identify an appropriate network for a manager in the workplace *(12 marks)* * Describe methods to establish and maintain effective professional relationships with the identified network *(20 marks)* |
| **By submitting I confirm that this assignment is my own work** | | |

**MARK SHEET – Understanding negotiation and networking in the workplace**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’.  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Know how to influence and negotiate with others to achieve objectives | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Explain the general principles of negotiation | **Referral [ca. 4/16]** | | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | | |  | |
| * The general principles of negotiation are merely stated or listed as opposed to explained * The general principles of negotiation are explained but the explanation is incorrect or minimal | | * The general principles of negotiation are correctly explained although the explanation may be limited | | * A thorough and detailed explanation is given of the general principles of negotiation | | |
| / 16  (min. of 8) | Pass or Referral |

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| AC 1.2  Explain a relevant technique for influencing others to achieve workplace objectives | **Referral [ca. 5/20]** | **Pass [10/20]** | | **Good Pass [ca. 15/20]** | **Assessor feedback on AC** | |
| * A relevant technique for influencing others to achieve workplace objectives is merely stated or described as opposed to explained * An explanation is given of a relevant technique for influencing others to achieve workplace objectives but the explanation is incorrect, inappropriate or minimal * An explanation is given of a relevant technique for influencing others in general but not applied to achieving workplace objectives | * A correct and appropriate explanation is given of a relevant technique (perhaps including, but not restricted to: negotiation tactics, behaviour, non-verbal communication, social skills) for influencing others to achieve workplace objectives although the explanation may be limited and/or the influence on objectives may be more implicit than explicit | | * An explanation is given of a relevant technique for influencing others to achieve workplace objectives is thoroughly explained in detail with the influence on objectives made explicitly clear |  | |
| / 20  (min. of 10) | Pass or Referral |
| AC 1.3  Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations | **Referral [ca. 4/16]** | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | **Assessor feedback on AC** | |
| * How to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations is merely stated as opposed to described * How to reduce resistance and minimise conflict is described in general **but** not related to achieving a win-win situation in the workplace and/or not related to negotiations * A description is given of how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations but the description is incorrect, inappropriate or minimal | * A description is given of how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations although the description may be limited | | * How to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations is thoroughly described in detail and the influence on the win-win situation during negotiations is made explicitly clear |  | |
| / 16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |

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| **Learning Outcome / Section 2:** Understand the value of networking | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | **Assessor feedback on AC** | |
| AC 2.1  Explain the value of networking | **Referral [ca. 4/16]** | **Pass [8/16]** | **Good Pass [ca. 12/16]** |  | |
| * The value of networking is merely stated as opposed to explained * An explanation is given of the value of networking but the explanation is incorrect, inappropriate or minimal | * The value of networking is explained although the explanation may be limited | * A thorough and detailed explanation is given of the value of networking |
| / 16  (min. of 8) | Pass or Referral |
| AC 2.2  Identify an appropriate network for a manager in the workplace | **Referral [ca. 3/12]** | **Pass [6/12]** | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * An appropriate network for a manager in the workplace is not identified * A network for a manager in the workplace is identified but is inappropriate or minimal | * A network for a manager in the workplace is identified | * A network for a manager in the workplace is identified in detail |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.3  Describe methods to establish and maintain effective professional relationships with the identified network | **Referral [ca. 5/20]** | **Pass [10/20]** | **Good Pass [ca. 15/20]** | **Assessor feedback on AC** | |
| * Methods to establish and maintain effective professional relationships with the identified network are merely stated or listed as opposed to described * A description is given of methods to establish and maintain effective professional relationships with the identified network but the description is incorrect, inappropriate or minimal | * At least two methods to establish and maintain effective professional relationships are described although the description may be limited and the relevance to the identified network may be implicit | * A thorough and detailed description is given of several methods to establish and maintain effective professional relationships explicitly with the identified network |  | |
| / 20  (min. of 10) | Pass or Referral |

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| **Section comments** (optional): | | **Verification comments** (optional): | | |
|  | | | **/ 100**  **TOTAL MARKS** | |
| **Assessor’s Decision** | | **Quality Assurance Use** | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of Assessor:**  **Date:** | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of QA:**  **Date of QA check:** |

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| Title: | **Understand how to lead effective meetings** | | |
| Level: | **3** | | |
| Credit value: | **2** | | |
| Unit guided learning hours | **4** | | |
| Learning outcomes (the learner will) | | Assessment criteria (the learner can) | |
| 1. Understand how to prepare and plan a meeting | | 1.1  1.2  1.3  1.4 | Explain the purpose of a meeting  Explain the purpose and structure of an agenda  Explain how to select and invite the right people to attend the meeting  Describe how to prepare prior to a meeting |
| 1. Understand how to manage a meeting | | 2.1  2.2  2.3  2.4 | Explain the roles and responsibilities of the chairperson, the secretary and individuals at a meeting  Explain basic meeting protocol and procedures  Explain positive and negative actions that can affect meetings  Explain the purposes of minutes and action plans |
| **Additional information about the unit** | |  | |
| Unit purpose and aim(s) | | To develop knowledge and understanding of meetings as required by a practising or potential first line manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | Links to Management & Leadership 2008 NOS: D11 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | Council for Administration (CfA) | |

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| Equivalencies agreed for the unit (if required) | | M3.33 - Effective meetings for managers |
| Location of the unit within the subject/sector classification system | | 15.3 – Business Management |
| **Additional Guidance about the Unit** | | |
| **Indicative Content:** | | |
| 1 | * The purpose, value and types of meeting * How to prepare an agenda for a meeting * How to consult with others and prepare to contribute effectively to a meeting * How to identify who are the appropriate people to attend a meeting * How to organise a meeting (physical resources, documentation, agenda) | |
| 2 | * How to make an effective contribution to discussion/decision making during a meeting * Roles and responsibilities of the chairperson, the secretary and individuals at a meeting * How to ensure all meeting delegates get the opportunity to contribute * How to deal with ‘negative’ meeting behaviours * How to manage time during a meeting * How to ensure meeting purposes and objectives are met * Purposes of minutes and action plans * The importance of follow-up procedures after a meeting and how to use action plans to do so | |

**Assignment Task for Unit: Understand how to lead effective meetings**

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| **Centre Number:** | **Centre Name:** | |
| **Learner Registration No:** | **Learner Name:** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of how effectiveness on leading meetings can be increased by good planning, preparation, and the use of meeting management techniques.  Where appropriate, you may choose to include examples of documentation you have completed with brief explanations to cover context, background, and your reasons for taking the approach shown.  The requirements of the task are set out in the sections below.  **NOTE:**  *You may want to relate your answers to an organisation that you work in. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.*  *You should plan to spend approximately 9 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment. The 'nominal' word count for this assignment is 1000 words: the suggested range is between 800 and 1500 words.*  *Check your assignment carefully prior to submission using the assessment criteria.* | | |
| *Please use the headings shown below when writing up your Assignment* | | **Assessment Criteria** |
| **Know how to prepare and plan a meeting**  Based on a meeting situation with which you are familiar provide responses to these assessment criteria showing how you plan and prepare for an effective meeting. Where appropriate, you may include examples of documentation you have completed with brief explanations. | | * Explain the purpose of a meeting *(12 marks)* * Explain the purpose and structure of an agenda *(12 marks)* * Explain how to select and invite the right people to attend the meeting *(12 marks)* * Describe how to prepare prior to a meeting *(12 marks)* |
| **Know how to manage a meeting**  Based on the example given above, explain the roles and responsibilities of those attending the meeting, including the correct protocols/procedures that should be followed.  Give some specific examples of the types of behaviour that in your view can have a positive or negative effect on the success of the meeting and in the case of negative behaviours explain how, as the chairman of the meeting you would address these. There are some models you could apply.  Explain how the meeting should be minuted, action points prepared and followed up. Where appropriate you may include examples of documentation you have completed with brief explanations. | | * Explain the roles and responsibilities of the chairperson, the secretary and individuals at a meeting *(12 marks)* * Explain basic meeting protocol and procedures *(16 marks)* * Explain positive and negative actions that can affect meetings *(12 marks)* * Explain the purposes of minutes and action plans *(12 marks)* |
| **By submitting I confirm that this assignment is my own work** | | |

**MARK SHEET – Understand how to lead effective meetings**

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| **Centre Number :** | |  | | **Centre Name :** | |  | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass.’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Understand how to prepare and plan a meeting | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | **Assessor feedback on AC** | |
| AC 1.1  Explained the purpose of a meeting | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | |  | |
| * The purpose of a meeting is not explained or if explained, is inaccurate or incorrect | | * The purpose of a meeting is explained | | * The purpose of a meeting or of different types of meetings is clearly and accurately explained | | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.2  Explained the purpose and structure of an agenda | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | | **Assessor feedback on AC** | |
| * The purpose and structure of an agenda is not explained or if explained, is inaccurate or incorrect | | * The purpose and structure of an agenda is explained | | * The purpose and structure of an agenda is clearly and accurately explained | | |  | |
| / 12  (min. of 6) | Pass or Referral |

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| AC 1.3  Explained how to select and invite the right people to attend the meeting | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * No explanation of how to select and invite the right people to attend the meeting is given or if given, is insufficient, inaccurate or incorrect | * Explanation of how to select and invite the right people to attend the meeting is given | | * Clear and accurate explanation of how to select and invite the right people to attend the meeting is given |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.4  Described how to prepare prior to a meeting | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | **Assessor feedback on AC** | |
| * No description is given of how to prepare prior to a meeting or if described , is insufficient, inaccurate or incorrect | * How to prepare prior to a meeting is described | | * How to prepare prior to a meeting is clear and accurate and preparations may be described in some detail |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |
| **Learning Outcome / Section 2:** Understand how to manage a meeting | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | **Assessor feedback on AC** | |
| AC 2.1  Explained the roles and responsibilities of the chairperson, the secretary and individuals at a meeting | **Referral [ca. 3/12]** | **Pass [6/12]** | | **Good Pass [ca. 9/12]** |  | |
| * No explanation is given of the roles and responsibilities of the chairperson, the secretary and individuals at a meeting or if given, is insufficient, inaccurate or incorrect or one of the roles is explained, not all the roles | * Explanation is given of the roles and responsibilities of the chairperson, the secretary and individuals at a meeting although the explanation may be limited | | * Clear and accurate explanation is given of the roles and responsibilities of the chairperson, the secretary and various individuals at a meeting |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.2  Explained basic meeting protocol and procedures | **Referral [ca. 4/16]** | **Pass [8/16]** | | **Good Pass [ca. 12/16]** | **Assessor feedback on AC** | |
| * No explanation is given of basic meeting protocol and procedures | * Explanation is given of basic meeting protocol and procedures although the explanation may be limited | | * Clear and accurate explanation is given of basic meeting protocol and procedures |  | |
| / 16  (min. of 8) | Pass or Referral |

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| AC 2.3  Explained positive and negative actions that can affect meetings | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * No explanation of positive and negative actions that can affect meetings are explained or are listed rather than explained or if explained, are inaccurate or incorrect, or has explained positive OR negative actions but not both | | * Both positive and negative actions that can affect meetings are explained although the explanation may be limited | | * Both positive and negative actions that can affect meetings are clearly and accurately explained, examples from own workplace may be given to enhance explanation | |  | |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.4  Explained the purposes of minutes and action plans | **Referral [ca. 3/12]** | | **Pass [6/12]** | | **Good Pass [ca. 9/12]** | | **Assessor feedback on AC** | |
| * The purposes of minutes and action plans are not explained or if explained, are insufficient, inaccurate or incorrect, or has explained purpose of minutes OR of actions plans but not both | | * The purposes of both minutes and action plans are explained | | * The purposes of both minutes and action plans are clearly and accurately explained in some detail | |  | |
| / 12  (min. of 6) | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | |
|  | | | | | | **/ 100**  **TOTAL MARKS** | | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | |

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| Title: | | **Managing risk in the workplace** | | |
| Level: | | 4 | | |
| Credit value: | | 3 | | |
| Unit guided learning hours | | 6 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand the importance of managing risks in the workplace | | | 1.1  1.2 | Evaluate relevant laws and legislation relating to risk management in own area of responsibility  Evaluate internal policies relating to the management of risk in own area of responsibility |
| 1. Be able to identify and manage risks in own area of responsibility | | | 2.1  2.2  2.3 | Conduct a risk assessment within the context of own workplace  Propose how to minimise identified risks in own workplace  Explain how identified risks will be continuously monitored and reviewed |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To be able to manage risks within the context of the workplace. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2004 NOS: B10 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for unit (if required) | | | M4.06 Managing Risk in the Workplace | |
| Location of the unit within the subject/sector classification system | | | 15.3 Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Establishing the context and scope of the workplace * Applicable laws and legislation relating to risk management * Internal risk management policies and procedures * Types of hazards and risks such as environmental, technological, information, physical * Principles of risk management * How to identify the circumstances and consequences of hazards and risks | | | |
| 2 | * Identifying prevention and control measures * Five steps to risk * Prioritisation of risk * Objective likelihood/probability, impact and score * Risk assessment procedure and associated documentation * Avoidance, control, transfer to another entity or higher authority, retention (careful assessment and monitoring of risk) * Risk management registers * Risk management planning * Compare actual results with results expected/predetermined * Monitoring and re-assessing the level and implications of risk | | | |

**ASSIGNMENT TASK for Unit: Managing risk in the workplace**

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| --- | --- | --- |
| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to be able to manage risks within the context of the workplace.  **note:**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  The nominal word count for this assignment is 2000 words: The suggested range is between 1500 and 2500 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Understand the importance of managing risks in the workplace**  Evaluate correctly and appropriately relevant laws and legislation relating to the management of environmental ***or*** technological ***or*** information ***or*** physical ***or*** any other appropriate category of risk in own area of responsibility to provide a conclusion or recommendations.  You are then required to evaluate internal policies relating to the management of risk in own area of responsibility and provide a conclusion or recommendations. | | * Evaluate relevant laws and legislation relating to risk management in own area of responsibility (20 marks) * Evaluate internal policies relating to the management of risk in own area of responsibility (20 marks) |
| **Be able to identify and manage risks in own area of responsibility**  Conduct a risk assessment correctly and appropriately within the context of own workplace to identify, evaluate and analyse the risk.  You are then required to take full account of the risk assessment to propose how to minimise identified risks in own workplace and explain how identified risks will be continuously monitored and reviewed. | | * Conduct a risk assessment within the context of own workplace (20 marks) * Propose how to minimise identified risks in own workplace (20 marks) * Explain how identified risks will be continuously monitored and reviewed (20 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET – M4.06 Managing risk in the workplace**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | | |
| **Learning Outcome / Section 1:** Understand the importance of managing risks in the workplace | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Evaluate relevant laws and legislation relating to risk management in own area of responsibility | **Referral [*5/20*]** | | **Pass [*10/20*]** | | | **Good Pass [*15/20*]** | | | | |  | | |
| * Relevant laws and legislation relating to the management of environmental ***or*** technological ***or*** information ***or*** physical ***or*** any other appropriate category of risk in own area of responsibility have not been evaluated, or the evaluation is incorrect or inappropriate, or are generic and not directly related to own area of responsibility, or are merely listed or described with no evaluation to provide a conclusion or recommendations | | * Relevant laws and legislation relating to the management of environmental ***or*** technological ***or*** information ***or*** physical ***or*** any other appropriate category of risk in own area of responsibility have been evaluated correctly and appropriately to provide a conclusion or recommendations, although the conclusion or recommendations require further development to cover all aspects of managing the risk | | | * Relevant laws and legislation relating to the management of environmental ***or*** technological ***or*** information ***or*** physical ***or*** any other appropriate category of risk in own area of responsibility have been evaluated correctly and appropriately to provide a conclusion or recommendations that covers all aspects of managing the risk | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 1.2  Evaluate internal policies relating to the management of risk in own area of responsibility | **Referral [*5/20*]** | | **Pass [*10/20*]** | | | **Good Pass [*15/20*]** | | | | |  | | |
| * Internal policies relating to the management of risk in own area of responsibility have not been evaluated, or the evaluation is incorrect or inappropriate, or internal policies are merely listed or described with no evaluation to provide a conclusion or recommendations | | * Internal policies relating to the management of risk in own area of responsibility have been evaluated correctly and appropriately to provide a conclusion or recommendations, although the conclusion or recommendations require further development to cover all aspects of managing the risk | | | * Internal policies relating to the management of risk in own area of responsibility have been evaluated correctly and appropriately to provide a conclusion or recommendations that covers all aspects of managing the risk | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
| **Learning Outcome / Section 2:** Be able to identify and manage risks in own area of responsibility | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Conduct a risk assessment within the context of own workplace | **Referral [5/20]** | | **Pass [10/20]** | | | **Good Pass [15/20]** | | | | |  | | |
| * A risk assessment has not been conducted within the context of own workplace, or has been conducted incorrectly or inappropriately | | * A risk assessment has been conducted correctly and appropriately within the context of own workplace to identify, evaluate and analyse the risk, although compliance with relevant laws and legislation and internal policies is not made explicit | | | * A risk assessment has been conducted correctly and appropriately within the context of own workplace to identify, evaluate and analyse the risk, and compliance with relevant laws and legislation and internal policies is made explicit | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 2.2  Propose how to minimise identified risks in own workplace | **Referral [5/20]** | | **Pass [10/20]** | | | **Good Pass [15/20]** | | | | |  | | |
| * How to minimise identified risks in own workplace is not proposed, or the proposal is incorrect or inappropriate, or the proposal does not take full account of the risk assessment | | * How to minimise identified risks in own workplace takes full account of the risk assessment and is correctly and appropriately proposed, although the proposal requires further development for full implementation | | | * How to minimise identified risks in own workplace takes full account of the risk assessment and is correctly and appropriately proposed and sufficiently developed for full implementation | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 2.3  Explain how identified risks will be continuously monitored and reviewed. | **Referral [5/20]** | | **Pass [10/20]** | | | **Good Pass [15/20]** | | | | |  | | |
| * How identified risks will be continuously monitored and reviewed is not explained, or the monitoring and review is incorrect or inappropriate, or the monitoring and review does not take full account of the proposal, or monitoring and review is merely stated with no account provided of how monitoring and review systems and procedures will work as an explanation | | * How identified risks will be continuously monitored and reviewed takes account of the proposal and is correctly and appropriately explained, although further development of the monitoring and review systems and procedures is required for full implementation | | | * How identified risks will be continuously monitored and reviewed takes full account of the proposal and is correctly and appropriately explained with reference to monitoring and review systems and procedures that are sufficiently developed for full implementation | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| **section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
|  | | | | | | | | | **/ 100** | | | **TOTAL MARKS** | |
| **Assessor’s Decision** | | | | | **Quality Assurance Use** | | | | | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date of QA Check:** | | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | | | **Signature of QA:**  **Date of QA check:** | | | |

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| Title: | | **Managing meetings (M4.30)** | | |
| Level: | | 4 | | |
| Credit value: | | 3 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand different types of meetings and their suitability for different purposes | | | 1.1  1.2 | Describe the different types of meetings in the organisation  Explain why it is necessary to have different types of meeting |
| 1. Understand how to prepare effectively for a meeting | | | 2.1  2.2  2.3  2.4 | Define the purpose for, and objectives of, a meeting  Identify the resources required to support and manage the meeting  Explain the reasoning behind who is to be invited to the meeting  Justify the information that attendees will be provided with in advance of the meeting |
| 3 Be able to develop own performance in managing meetings | | | 3.1  3.2  3.3 | Evaluate own ability to be able to chair / lead a meeting gaining feedback from others  Identify areas of weakness in own performance when managing meetings  Create a personal development plan to improve own performance when managing meetings |
| 1. Be able to follow up and effectively manage actions from meetings | | | 4.1  4.2  4.3 | Monitor the progress of actions agreed by relevant meeting attendees  Manage any personal actions from the meeting to deadlines  Evaluate the impact on the organisation of all the actions agreed at the meeting |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop understanding and ability to manage meetings as required by a practising or potential middle manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to MSC 2004 NOS: D2, D6 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Management Standards Centre (MSC) | |
| Location of the unit within the subject/sector classification system | | | Business Management | |
| Unit guided learning hours | | | 15 | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Situations when meetings are/are not appropriate * Different types and purposes of meetings (including formal/informal, decision-making, informing, instructing, negotiating) | | | |
| 2 | * Role and responsibilities of chairperson/leader in relation to formal and informal meetings * Setting the objectives for a meeting * Measures to prepare effectively including consultation, reference to documents and other evidence; preparation of papers/presentations * Methods of planning a meeting to achieve particular outcomes (including participants, objective agendas, format and location) * Meetings documents, terminology and protocol * Ways to encourage contributions, and control digression and conflict to ensure outcomes are achieved within timescale and authority * Nature, purpose, style and format of minutes or other records | | | |
| 3 | * Evaluating own performance in meetings * Techniques for collecting and analysing feedback from others * Personal SWOT analysis * Personal development planning * The importance of defining objectives, and deciding whether negotiation is the appropriate measure to take * Formal and informal negotiation * Importance of listening and other interpersonal skills * Ways to identify acceptable outcomes, from the ideal to least acceptable, and their consequences * Techniques for influencing others, including non-verbal communication and social skills * Assertiveness * Levels of power and authority, and the impact on negotiation * Negotiation strategy, tactics and behaviour * Conflict and its resolution * Value systems and other barriers to acceptance * The importance of achieving “win-win” and its effects on long term relationships | | | |
| 4 | * Methods of ensuring actions are completed as required by the meeting * Planning and monitoring of action points of self and others * Impact assessment and potential costs and benefits | | | |

**ASSIGNMENT TASK for Unit: Managing meetings**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to develop understanding and ability to manage meetings as required by a practising or potential middle manager.  **note**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  The nominal word count for this assignment is 2500 words: The suggested range is between 2000 and 3000 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Understand different types of meetings and their suitability for different purposes**  Describe the principal features of the different types of meetings in the organisation and to provide an account of the practices of the different types of meetings to explain why each is necessary. | | * Describe the different types of meetings in the organisation (4 marks) * Explain why it is necessary to have different types of meeting (8 marks) |
| **Understand how to prepare effectively for a meeting**  Define the purpose for the meeting and to provide clear and measurable objectives.  You are then required to identify the resources required to support and manage the meeting’s purpose and objectives; justify the information attendees will be provided with in advance of the meeting, and to provide reasons to explain who is to be invited to the meeting. | | * Define the purpose for, and objectives of, a meeting (4 marks) * Identify the resources required to support and manage the meeting (4 marks) * Explain the reasoning behind who is to be invited to the meeting (8 marks) * Justify the information that attendees will be provided with in advance of the meeting (8 marks) |
| **Be able to develop own performance in managing meetings**  Undertake a meaningful evaluation of own ability to be able to chair / lead a meeting by gaining appropriate feedback from others to provide a conclusion or recommendations.  The evaluation is then used to identify areas of weakness and to create a personal development plan to improve own performance when managing meetings. | | * Evaluate own ability to be able to chair / lead a meeting gaining feedback from others (12 marks) * Identify areas of weakness in own performance when managing meetings (8 marks) * Create a personal development plan to improve own performance when managing meetings (12 marks) |
| **Be able to follow up and effectively manage actions from meetings**  Provide evidence that the progress of actions agreed by relevant meeting attendees is monitored correctly and appropriately and that any personal actions from the meeting are correctly and appropriately managed to deadlines.  You are then required to evaluate the impact on the organisation of all the actions agreed at the meeting in order to provide a conclusion or recommendations. | | * Monitor the progress of actions agreed by relevant meeting attendees (8 marks) * Manage any personal actions from the meeting to deadlines (8 marks) * Evaluate the impact on the organisation of all the actions agreed at the meeting (16 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET – MANAGING MEETINGS**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | |
| 1. **Learning Outcome / Section 1:** Understand different types of meetings and their suitability for different purposes | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Describe the different types of meetings in the organisation | **Referral [ca.*1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [ca. 3/4]** | | | |  | | |
| * The different types of meetings in the organisation are not described, or the descriptions are incorrect or deficient, or only one type of meeting is described * Different types of meetings are merely listed with no description of their principal features | | * Limited but sufficient principal features of the different types of meetings in the organisation are correctly described | | | * The principal features of the different types of meetings in the organisation are correctly and comprehensively described | | | |
| / 4  (min. of 2) | | Pass or Referral |
| AC 1.2  Explain why it is necessary to have different types of meeting | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * Why it is necessary to have different types of meetings is not explained, or the explanation is incorrect or deficient, or it is merely stated with no account of the practices of different types of meetings to explain why they are necessary | | * A limited but sufficient and correct account of the practices of different types of meetings is provided to explain why each is necessary | | | * A full and correct account of the practices of different types of meetings is provided to explain why each is necessary | | | |
| / 8  (min. of 4) | | Pass or Referral |
| **Assessment comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
| **Learning Outcome / Section 2:** Understand how to prepare effectively for a meeting | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Define the purpose for, and objectives of, a meeting | **Referral [ca.*1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [ca. 3/4]** | | | |  | | |
| * The purpose for, and objectives of, a meeting have not been defined before the meeting, or the purpose ***or*** the objectives is defined but not both * The objectives are inappropriate for the purpose for the meeting, or the objectives cannot be measured, or the objectives are entirely unclear or unrealistic | | * The purpose for, and objectives of, a meeting have both been defined before the meeting, although the boundaries of the meeting are imprecise * The objectives are clear, appropriate and realistic for the purpose for the meeting, although how the objectives will be measured is imprecise or is not made explicit | | | * The purpose for, and objectives of, a meeting have both been clearly defined before the meeting and have established precise boundaries for the meeting * The objectives are clear, appropriate and realistic for the purpose for the meeting with precise measures made explicit | | | |
| / 4  (min. of 2) | | Pass or Referral |
| AC 2.2  Identify the resources required to support and manage the meeting | **Referral [ca.*1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [ca. 3/4]** | | | |  | | |
| * The resources required to support and manage the meeting are not identified, or the resources are incorrect, inappropriate or deficient for the meeting’s purpose and objectives | | * Limited but sufficient, correct and appropriate resources required to support and manage the meeting’s purpose and objectives are identified, although why they have been identified is imprecise or is not made explicit | | | * All resources required to support and manage the meeting’s purpose and objectives are identified and are correct and appropriate and why they have been identified is made explicit | | | |
| / 4  (min. of 2) | | Pass or Referral |
| AC 2.3  Explain the reasoning behind who is to be invited to the meeting | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * The reasoning behind who is to be invited to the meeting is not explained, or who is to be invited is merely stated with no explanation as to why, or the reasoning to explain who is to be invited is incorrect or inappropriate for the meeting’s purpose and objectives | | * Limited but sufficient and correct reasons are provided to explain who is to be invited to the meeting, although the contribution each is expected to make to the meeting’s purpose and objectives is imprecise or not made explicit | | | * Detailed and correct reasons are provided to fully explain who is to be invited to the meeting and the contribution each is expected to make to the meetings purpose and objectives is precise and made explicit | | | |
| / 8  (min. of 4) | | Pass or Referral |
| AC 2.4  Justify the information that attendees will be provided with in advance of the meeting | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * The information that attendees will be provided with in advance of the meeting is not justified or is deficient, or the justification is incorrect or inappropriate for the meeting’s purpose and objectives, or the information is merely listed or described with no argument presented to justify the information in terms of the meeting’s purpose and objectives | | * A limited but sufficient argument is correctly and appropriately presented in terms of the meeting’s purpose and objectives to justify the information that attendees will be provided with in advance of the meeting | | | * A detailed argument is correctly and appropriately presented in terms of the meeting’s purpose and objectives to justify the information that attendees will be provided with in advance of the meeting | | | |
| / 8  (min. of 4) | | Pass or Referral |
| **Assessment comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
| **Learning Outcome / Section 3:** Be able to develop own performance in managing meetings | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 3.1  Evaluate own ability to be able to chair / lead a meeting gaining feedback from others | **Referral [ca.*3/12*]** | | **Pass [*6/12*]** | | | **Good Pass [ca. 9/12]** | | | |  | | |
| * Own ability to be able to chair / lead a meeting has not been evaluated by gaining feedback from others, or the feedback is insufficient to undertake a meaningful evaluation, or the evaluation is inappropriate or deficient, or own ability to be able to chair / lead a meeting is merely described with no evaluation using feedback from others to provide a conclusion or recommendations | | * A limited but sufficient and meaningful evaluation of own ability to be able to chair / lead a meeting has been undertaken by gaining appropriate feedback from others to provide a conclusion or recommendations, although the feedback covers a limited but sufficient range of the meeting’s activities, items or discussions | | | * A comprehensive and meaningful evaluation of own ability to be able to chair / lead a meeting has been undertaken to provide a conclusion or recommendations by gaining detailed appropriate feedback from others that addresses the full scope of all the meeting’s activities, items or discussions | | | |
| / 12  (min. of 6) | | Pass or Referral |
| AC 3.2  Identify areas of weakness in own performance when managing meetings | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * Areas of weakness have not been identified, or areas of weakness are not based on an evaluation of own ability, or areas of weakness are merely listed with no context | | * Areas of weakness have been identified based on an evaluation of own ability, although the context for the areas of weakness is limited but sufficient | | | * Areas of weakness have been identified based on an evaluation of own ability and a detailed context is provided for each area | | | |
| / 8  (min. of 4) | | Pass or Referral |
| AC 3.3  Create a personal development plan to improve own performance when managing meetings | **Referral [ca.*3/12*]** | | **Pass [*6/12*]** | | | **Good Pass [ca. 9/12]** | | | |  | | |
| * A personal development plan to improve own performance when managing meetings is not created, or the personal development plan is inappropriate or deficient, or the personal development plan is not based on an evaluation of own ability, or the personal development plan does not address areas of weakness | | * A limited but sufficient and appropriate personal development plan to improve own performance when managing meetings is created and is based on an evaluation of own ability and addresses areas of weakness, although further work on the plan is required for full implementation | | | * A comprehensive and appropriate personal development plan to improve own performance when managing meetings is created that is based on a full evaluation of own ability and addresses all areas of weakness and requires no further work for full implementation | | | |
| / 12  (min. of 6) | | Pass or Referral |
| **Assessment comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
| 1. **Learning Outcome / Section 4:** Be able to follow up and effectively manage actions from meetings | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 4.1  Monitor the progress of actions agreed by relevant meeting attendees | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * There is no evidence that the progress of actions agreed by relevant meeting attendees is monitored, or the monitoring is incorrect or inappropriate or deficient | | * Limited but sufficient evidence is provided that the progress of actions agreed by relevant meeting attendees is monitored correctly and appropriately | | | * Comprehensive evidence is provided that the progress of actions agreed by relevant meeting attendees is monitored correctly and appropriately | | | |
| / 8  (min. of 4) | | Pass or Referral |
| AC 4.2  Manage any personal actions from the meeting to deadlines | **Referral [ca.*2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [ca. 6/8]** | | | |  | | |
| * There is no evidence that personal actions from the meeting are managed to deadlines, or the management of personal actions to deadlines is incorrect or inappropriate or deficient | | * Limited but sufficient evidence is provided that personal actions from the meeting are correctly and appropriately managed to deadlines | | | * Comprehensive evidence is provided that personal actions from the meeting are correctly and appropriately managed to deadlines | | | |
| / 8  (min. of 4) | | Pass or Referral |
| AC 4.3  Evaluate the impact on the organisation of all the actions agreed at the meeting | **Referral [ca.*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [ca. 12/16]** | | | |  | | |
| * The impact on the organisation of all the actions agreed at the meeting is not evaluated, or the evaluation is incorrect or deficient, or the impact on the organisation is merely stated or described with no evaluation to provide a conclusion or recommendations | | * A limited but sufficient and correct evaluation of the impact on the organisation of all the actions agreed at the meeting provides a conclusion or recommendations, although the evidence base for the evaluation is subjective or narrow | | | * A full and correct evaluation of the impact on the organisation of all the actions agreed at the meeting provides a conclusion or recommendations based on a wide and objective evidence base | | | |
| / 16  (min. of 8) | | Pass or Referral |
| **Assessment comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
|  | | | | | | | | | **/ 100** | | **TOTAL MARKS** | |

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| **Assessor’s Decision** | | **Quality Assurance Use** | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of Assessor:**  **Date of QA Check:** | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of QA:**  **Date of QA check:** |

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| Title: | | **Motivating people in the workplace** | | |
| Level: | | 4 | | |
| Credit value: | | 2 | | |
| Unit guided learning hours | | 6 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand the factors that may affect performance and motivation in the work place | | | 1.1  1.2 | Evaluate theories of motivation relevant to your workplace  Evaluate the principal factors that may affect performance and motivation in the workplace |
| 1. Be able to improve levels of motivation and increase performance in the workplace | | | 2.1  2.2 | Select a theory of motivation and apply this to your workplace  Evaluate the impact of applying the theory of motivation on performance in the workplace |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To be able to examine how levels of motivation can be improved to increase performance in the workplace. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2004 NOS | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M4.07 Motivating People in the Workplace | |
| Location of the unit within the subject/sector classification system | | | 15.3 Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Theories of motivation, including ‘Content’ and ‘Process’ theories, and their application to teams and individuals * Factors that affect performance and motivation (individual differences/needs, manager behaviour, the job and organisational context etc) * Assumptions about human behaviour and the limitations of traditional theories of motivation * Case studies and research evidence on using motivation theory in the workplace * Styles and patterns of behaviour at work * Individual motivation and team motivation and potential conflicts between the two * Incentive systems and the impact on performance | | | |
| 2 | * Theories of motivation and their application to teams and individuals * Understanding how individuals and teams are motivated * Tools and techniques for the identification of different motivational needs * Range of techniques to motivate individuals and monitor performance * Positive approaches to offset negative attitudes in the workplace * Measures for evaluating performance such as productivity, quality, cost, time | | | |

**ASSIGNMENT TASK for Unit: Motivating people in the workplace**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to be able to examine how levels of motivation can be improved to increase performance in the workplace.  **note:**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  **NOTE:**  *You should plan to spend approximately 13 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment.*  The nominal word count for this assignment is 2000 words: The suggested range is between 1500 and 2500 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Understand the factors that may affect performance and motivation in the work place**  Evaluate two or more theories of motivation that are clearly relevant to your workplace to provide a conclusion or recommendations, and evaluate the principal factors that may affect performance and motivation in the workplace to provide a conclusion or recommendations. | | * Evaluate theories of motivation relevant to your workplace (28 marks) * Evaluate the principal factors that may affect performance and motivation in the workplace (20 marks) |
| **Be able to improve levels of motivation and increase performance in the workplace**  Select and correctly apply an appropriate theory of motivation and then to evaluate the impact on performance in the workplace of applying the theory to provide a conclusion or recommendations. | | * Select a theory of motivation and apply this to your workplace (24 marks) * Evaluate the impact applying the theory of motivation had on performance in the workplace (28 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET – M4.07 Motivating people in the workplace**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | | |
| **Learning Outcome / Section 1:** Understand the factors that may affect performance and motivation in the work place | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Evaluate theories of motivation relevant to your workplace | **Referral [*7/28*]** | | **Pass [*14/28*]** | | | **Good Pass [*21/28*]** | | | | |  | | |
| * Theories of motivation relevant to your workplace have not been evaluated, or only one theory of motivation relevant to your workplace has been evaluated * Theories of motivation have been evaluated incorrectly, or the theories of motivation are not relevant to your workplace * Theories of motivation relevant to your workplace are merely identified or listed with no evaluation to provide a conclusion or recommendations | | * Two or more theories of motivation that are clearly relevant to your workplace have been correctly and appropriately evaluated to provide a conclusion or recommendations, although the evidence base for the conclusion or recommendations may be subjective and/or limited | | | * Two or more theories of motivation that are clearly relevant to your workplace have been correctly and appropriately evaluated using a wide and objective evidence base to provide a conclusion or recommendations | | | | |
| / 28  (min. of 14) | | Pass or Referral |
| AC 1.2  Evaluate the principal factors that may affect performance and motivation in the workplace | **Referral [*5/20*]** | | **Pass [*10/20*]** | | | **Good Pass [*15/20*]** | | | | |  | | |
| * The principal factors that may affect performance and motivation in the workplace are not addressed, or are incorrect or incomplete * The principal factors that may affect performance and motivation in the workplace are merely identified or listed with no evaluation to provide a conclusion or recommendations | | * The principal factors that may affect performance and motivation in the workplace are correct and appropriate and the principal factors have been correctly and appropriately evaluated to provide a conclusion or recommendations, although the evidence base for the conclusion or recommendations may be subjective and/or limited | | | * The principal factors that may affect performance and motivation in the workplace are correct and appropriate, and the principal factors have been correctly and appropriately evaluated using a wide and objective evidence base to provide a conclusion or recommendations | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
| **Learning Outcome / Section 2:** Be able to improve levels of motivation and increase performance in the workplace | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Select a theory of motivation and apply this to your workplace | **Referral [6/24]** | | **Pass [12/24]** | | | **Good Pass [18/24]** | | | | |  | | |
| * No theory of motivation has been selected and applied, or the theory of motivation selected is incorrect or inappropriate, or the theory of motivation has been applied incorrectly or inappropriately | | * An appropriate theory of motivation has been selected and correctly applied, although the application of the theory is limited | | | * An appropriate theory of motivation has been selected and correctly applied in full | | | | |
| / 24  (min. of 12) | | Pass or Referral |
| AC 2.2  Evaluate the impact of applying the theory of motivation on performance in the workplace | **Referral [7/28]** | | **Pass [14/28]** | | | **Good Pass [21/28]** | | | | |  | | |
| * The impact on performance in the workplace of applying the theory of motivation has not been evaluated, or has been evaluated incorrectly or inappropriately, or the impact on performance in the workplace has merely been listed or described with no evaluation to provide a conclusion or recommendations | | * The impact on performance in the workplace of applying the theory of motivation has been correctly and appropriately evaluated to provide a conclusion or recommendations, although the evidence base for the conclusion or recommendations may be subjective and/or limited | | | * The impact on performance in the workplace of applying the theory of motivation has been correctly and appropriately evaluated using a wide and objective evidence base to provide a conclusion or recommendations | | | | |
| / 28  (min. of 14) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
|  | | | | | | | | | **/ 100** | | | **TOTAL MARKS** | |
| **Assessor’s Decision** | | | | | **Quality Assurance Use** | | | | | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date of QA Check:** | | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | | | **Signature of QA:**  **Date of QA check:** | | | |

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| Title: | | **Solving problems by making effective decisions in the workplace** | | |
| Level: | | 4 | | |
| Credit value: | | 3 | | |
| Unit guided learning hours | | 14 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Be able to analyse a complex problem in the context of the workplace | | | 1.1  1.2 | Define a complex problem in the workplace including its scope and impact  Analyse information on the identified problem, to help inform the decision making process |
| 1. Be able to apply decision making techniques when assessing possible solutions | | | 2.1  2.2 | Propose a range of alternative solutions to the problem  Using a decision making technique, evaluate a range of solutions to identify the most appropriate option |
| 1. Be able to plan how you will implement the solution | | | 3.1  3.2  3.3 | Develop a detailed plan for implementing the solution  Communicate the plan to relevant stakeholders  Assess appropriate monitoring and review techniques to ensure successful implementation of solution |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To enable candidates to make effective decisions to solve complex problems in the workplace. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management & Leadership 2004 NOS: C2, C5, C6, F6 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | M4.08 solving problems by making effective decisions | |
| Location of the unit within the subject/sector classification system | | | 15.3 Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Complex problems with multiple possible solutions as a challenge and an opportunity for improvement * Ways to recognise, investigate, and analyse complex problems such as Root Cause Analysis (RCA), Cause and Effect, Ishikawa, Why-Why, and brainstorming and a range of other creative thinking techniques * Framing and scoping problems with a ‘Problem Definition’ * Setting objectives in relation to problems * Collecting primary and secondary data for decision making * **Data analysis techniques for quantitative and qualitative data** * Differences between ‘data’ and ‘information’ | | | |
| 2 | * Conditions under which decisions are made (certainty, uncertainty) * Creative and rational decision-making * Techniques for generating creative solutions and rational solutions in decision-making * Establishing criteria for decision-making * Setting priorities * Evaluating options * Rational decision making models and techniques such as grid analysis, paired comparison analysis, decision trees, ‘pros and cons’ * Creative decision-making using brainstorming and a range of other creative thinking techniques * Types of decisions (routine, adaptive, innovative etc) * Decision making in relation to goals which specify the quality or quantity of the desired results | | | |
| 3 | * Implementation planning (for example – human resources, finance, marketing, operations, health and safety) * Resource allocation (money, people, facilities, equipment etc) * Implementation planning tools and techniques such as GANTT charts, PDCA Cycle (plan-do-check-act), PDSA (plan-do-study-act) * SMART objectives * Communication plans * Monitoring and review techniques such as Critical Path Analysis (CPA), Programme Evaluation and Review (PERT) | | | |

**ASSIGNMENT TASK for Unit: Solving problems by making effective decisions in the workplace**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is enable candidates to make effective decisions to solve complex problems in the workplace.  **note:**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  **NOTE:**  *You should plan to spend approximately 13 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment.*  The nominal word count for this assignment is 2000 words: The suggested range is between 1500 and 2500 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Be able to analyse a complex problem in the context of the workplace**  Define a complex problem in the workplace that makes clear the difference between the actual condition and the desired condition, taking care to ensure that the scope and impact of the problem take account of the complexity of the problem and make it clear who the owner(s) of the problem are and why a solution is needed.  You are then required to analyse information that reflects the complexity, scope and impact of the problem to identify possible causes of the problem to help inform the decision-making process. | | * Define a complex problem in the workplace including its scope and impact (12 marks) * Analyse information on the identified problem, to help inform the decision making process (16 marks) |
| **Be able to apply decision making techniques when assessing possible solutions**  Propose alternative solutions to the problem based on the analysis of information and to use a decision-making technique correctly and appropriately to evaluate the proposed alternative solutions and identify the most appropriate option. | | * Propose a range of alternative solutions to the problem (12 marks) * Using a decision making technique, evaluate a range of solutions to identify the most appropriate option (16 marks) |
| **Be able to plan how you will implement the solution**  Develop a correct and appropriate detailed plan for implementing the solution that clarifies objectives, assigns tasks with deadlines and charts progress in reaching goals and milestones, and to provide evidence that the implementation plan has been communicated correctly and appropriately to meet the identified communication needs of relevant stakeholders.  Finally, you are required to assess monitoring and review techniques to make a judgement as to their appropriateness to ensure successful implementation of the chosen solution. | | * Develop a detailed plan for implementing the solution (20 marks) * Communicate the plan to relevant stakeholders (12 marks) * Assess appropriate monitoring and review techniques to ensure successful implementation of solution (12 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET Solving problems by making effective decisions in the workplace**

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| **Centre Number :** | | |  | | **Centre Name :** | | |  | | | |
| **Learner Registration No :** | | |  | | **Learner Name:** | | |  | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | |
| **Learning Outcome / Section 1:** Be able to analyse a complex problem in the context of the workplace | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | |
| AC 1.1  Define a complex problem in the workplace including its scope and impact | **Referral [*3/12*]** | | | **Pass [*6/12*]** | | | **Good Pass [*9/12*]** | | |  | |
| * A complex problem in the workplace has not been defined * The problem defined is not a complex problem with multiple possible solutions * It is not clear what the problem is * The difference between the actual condition and the desired condition is not clear * There are no restrictions placed on the solution such as time, budget and resources * The scope and impact of the complex problem are not included in the problem definition, or the scope and/or impact is insufficient in relation to the complexity of the problem, or the owner(s) of the problem and/or why a solution is needed is not clear in the scope and impact | | | * A complex problem in the workplace with multiple possible solutions has been defined in a way that makes clear the difference between the actual condition and the desired condition, although limited consideration has been given to restrictions placed on the solution such as time, budget and resources * The scope and impact of the complex problem take account of the complexity of the problem and make it clear who the owner(s) of the problem are and why a solution is needed, although the scope and impact are restricted to the local level and do not take account of the scope and impact across the organisation | | | * A complex problem in the workplace with multiple possible solutions has been defined in a way that makes clear both the difference between the actual condition and the desired condition ***and*** the restrictions placed on the solution such as time, budget and resources * The scope and impact of the complex problem are considered across the organisation and take account of the complexity of the problem and make it clear who the owner(s) of the problem are and why a solution is needed | | |
| / 12  (min. of 6) | Pass or Referral |
| AC 1.2  Analyse information on the identified problem, to help inform the decision making process | | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | |  | |
| * Information on the identified problem has not been analysed, or the analysis does not identify possible causes of the problem, or the analysis is incorrect or inappropriate, or the analysis does not reflect the complexity or scope or impact of the problem | | * Information has been analysed correctly and appropriately to reflect the complexity, scope and impact of the problem and to identify possible causes of the problem, although the analysis is based on information from limited sources | | | * Information from a wide range of sources has been analysed correctly and appropriately to reflect the complexity, scope and impact of the problem and to identify possible causes of the problem | | |
| /16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | | | | **Verification comments** (optional): | | | | | |

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| **Learning Outcome / Section 2:** Be able to apply decision making techniques when assessing possible solutions | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | |
| AC 2.1  Propose a range of alternative solutions to the problem | **Referral [3/12]** | **Pass [6/12]** | | **Good Pass [9/12]** |  | |
| * No alternative solution to the problem is proposed, or only one solution is proposed * Alternative solutions are incomplete or inappropriate, or are not based on the analysis of information, or do not identify resource requirements | * Alternative solutions to the problem are proposed that are complete and appropriate and are based on the analysis of information, although limited consideration is given to resource requirements | | * Alternative complete and appropriate solutions to the problem based on the analysis of information are proposed with detailed resource considerations |
| / 12  (min. of 6) | Pass or Referral |
| AC 2.2  Using a decision making technique, evaluate a range of solutions to identify the most appropriate option | **Referral [*4/16*]** | **Pass [*8/16*]** | | **Good Pass [*12/16*]** |  | |
| * A decision-making technique has not been used, or: * has been used incorrectly or inappropriately * the criteria for decision-making are missing or inappropriate * has not been used on the alternative solutions proposed * does not take account of the restrictions placed on the solution in the problem definition such as time, budget and resources | * A decision-making technique with appropriate criteria that takes account of the restrictions placed on the solution in the problem definition such as time, budget and resources has been used correctly and appropriately on the alternative solutions proposed, although the weightings for the alternative solutions is unclear and/or the alternative solutions have not been ranked in order of preference | | * A decision-making technique with appropriate criteria that takes account of the restrictions placed on the solution in the problem definition such as time, budget and resources has been used correctly and appropriately on the alternative solutions to weight each solution in a transparent manner and rank the solutions in order of preference |
| / 16  (min. of 8) | Pass or Referral |
| **Section comments** (optional): | | | **Verification comments** (optional): | | | |

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| **Learning Outcome / Section 3** Be able to plan how you will implement the solution | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | |
| AC 3.1  Develop a detailed plan for implementing the solution | **Referral [5/20]** | **Pass [10/20]** | **Good Pass [15/20]** |  | |
| * A detailed plan for implementing the solution that clarifies objectives, assigns tasks with deadlines and charts progress in reaching goals and milestones has not been developed, or the implementation plan is incorrect, inappropriate or incomplete | * A correct and appropriate detailed plan for implementing the solution that clarifies objectives, assigns tasks with deadlines and charts progress in reaching goals and milestones has been developed, although the implementation plan needs further development for full implementation | * A correct and appropriate detailed plan for implementing the solution that clarifies objectives, assigns tasks with deadlines and charts progress in reaching goals and milestones has been developed for full implementation |
| / 20  (min. of 10) | Pass or Referral |
| AC 3.2  Communicate the plan to relevant stakeholders | **Referral [*3/12*]** | **Pass [*6/12*]** | **Good Pass [*9/12*]** |  | |
| * The implementation plan has not been communicated to relevant stakeholders, or has been communicated incorrectly or inappropriately, or the communication needs of relevant stakeholders have not been identified, or are incorrect, inappropriate or incomplete | * Evidence is provided that the implementation plan has been communicated correctly and appropriately to meet the identified communication needs of relevant stakeholders, although a formal communication plan is not provided | * Evidence is provided that the implementation plan has been communicated correctly and appropriately to meet the identified communication needs of relevant stakeholders and a formal communication plan is provided |
| / 12  (min. of 6) | Pass or Referral |

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| AC 3.3  Assess appropriate monitoring and review techniques to ensure successful implementation of solution | **Referral [*3/12*]** | | **Pass [*6/12*]** | | **Good Pass [*9/12*]** | | |  | | |
| * Monitoring and review techniques to ensure successful implementation of solution have not been assessed, or are incorrect or inappropriate, or monitoring and review techniques are merely listed or described with no assessment using criteria to make a judgement as to their appropriateness | | * Correct and appropriate monitoring and review techniques have been assessed to make a judgement as to their appropriateness to ensure successful implementation of the solution, although the criteria used for the assessment are subjective and/or not transparent | | * Correct and appropriate monitoring and review techniques have been assessed using objective and transparent criteria to make a judgement as to their appropriateness to ensure successful implementation of the solution | | |
| / 12  (min. of 6) | | Pass or Referral |
| **Section comments** (optional): | | | | **Verification comments** (optional): | | | | | | |
|  | | | | | | **/ 100** | | | **TOTAL MARKS** | |
| **Assessor’s Decision** | | | | **Quality Assurance Use** | | | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date of QA Check:** | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | **Signature of QA:**  **Date of QA check:** | | | |

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| --- | --- | --- | --- | --- |
| Title: | | **Budgetary planning and control** | | |
| Level: | | 4 | | |
| Credit value: | | 3 | | |
| Unit guided learning hours | | 6 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Understand how budgetary planning and the effective and controlled implementation of budgets both support and deliver the organisation’s objectives | | | 1.1  1.2  1.3  1.4 | Review the effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives  and policies  Review the effectiveness of the organisation in allocating responsibilities for budget management and control  Review the effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives  Recommend improvements to the organisation’s budgetary planning and implementation processes |
| 1. Understand how to measure and monitor performance against budgets and their objectives | | | 2.1  2.2 | Review the organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives  Recommend improvements to the measurement, monitoring and reporting of performance against budgets and their objectives |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To understand how the proper construction and control of budgets is used by organisations to manage performance to meet financial and strategic objectives. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to Management and Leadership 2004 NOS: E1 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Council for Administration (CfA) | |
| Equivalencies agreed for the unit (if required) | | | N/A | |
| Location of the unit within the subject/sector classification system | | | 15.3 Business Management | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Differences between budgetary control and financial control * Budgetary control as the establishment of budgets and associated responsibilities of budget holders and the continuous comparisons of actual and budget * Budgets as a planned and integral part of the strategic and operational management of the organisation * Budget preparation and the principal budget factor * Alignment of budgets with managerial responsibilities * Elements of a system of budgetary planning and control, such as developing plans to achieve objectives, communicating proposed plans, motivating people to achieve the plans, reporting performance * Characteristics of a good budget * Budget organisation and administration * Advantages of, and problems with, budgetary planning and control | | | |
| 2 | * Budget planning and control systems * Monitoring budgets to verify expenditure or income against targets and to identify changing patterns or circumstances that may give rise to the need for corrective management action or changes in policy * Reporting back the variances between ‘budgeted’ and ‘actual cost’ * Comparing actual results with budgets and assigning responsibilities for variances to individuals who can either exercise control action or revise the original budgets * Budgetary control and responsibility centres * Variance analysis * Management action and cost control | | | |

**ASSIGNMENT TASK for Unit - Budgetary planning and control**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to understand how the proper construction and control of budgets is used by organisations to manage performance to meet financial and strategic objectives.    **note**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.  **NOTE:**  *You should plan to spend approximately 22 hours researching your workplace context, preparing for and writing or presenting the outcomes of this assignment for assessment.*  The nominal word count for this assignment is 2000 words: The suggested range is between 1500 and 2500 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Understand how budgetary planning and the effective and controlled implementation of budgets both support and deliver the organisation’s objectives**  The first part of this task requires you to review each of the following to make a judgement based on a combination of evidence and practice:   * the effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies * the effectiveness of the organisation in allocating responsibilities for budget management and control * the effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives   You are then required to recommend improvements to the organisation’s budgetary planning and implementation processes based on the review of budgetary planning and implementation. | | * Review the effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies (16 marks) * Review the effectiveness of the organisation in allocating responsibilities for budget management and control (16 marks) * Review the effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives (16 marks) * Recommend improvements to the organisation’s budgetary planning and implementation processes (16 marks) |
| **Understand how to measure and monitor performance against budgets and their objectives**  The second part of the task requires you to review the organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives, and then to recommend improvements to the measurement, monitoring and reporting of performance against budgets and their objectives. | | * Review the organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives (20 marks) * Recommend improvements to the measurement, monitoring and reporting of performance against budgets and their objectives (16 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET –Budgetary planning and control**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | |
| **Learning Outcome / Section 1:** Understand how budgetary planning and the effective and controlled implementation of budgets both support and deliver the organisation’s objectives | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Review the effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | | |  | | |
| * The effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies has not been reviewed, or the review is incorrect or inappropriate, or the effectiveness of the budgetary planning process has merely been stated or described with no judgement made based on a combination of evidence and practice | | * The effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies has been correctly and appropriately reviewed and a judgement made based on a combination of evidence and practice, although the evidence base for the review is limited | | | * The effectiveness of the organisation’s budgetary planning process in supporting the delivery of the organisation’s strategic objectives and policies has been correctly and appropriately reviewed using a wide evidence base and a judgement made based on a combination of evidence and practice | | | |
| / 16  (min. of 8) | | Pass or Referral |
| AC 1.2  Review the effectiveness of the organisation in allocating responsibilities for budget management and control | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | | |  | | |
| * The effectiveness of the organisation in allocating responsibilities for budget management and control has not been reviewed, or the review is incorrect or inappropriate, or the effectiveness of the organisation in allocating responsibilities has merely been stated or described with no judgement made based on a combination of evidence and practice | | * The effectiveness of the organisation in allocating responsibilities for budget management and control has been correctly and appropriately reviewed and a judgement made based on a combination of evidence and practice, although the evidence base for the review is limited | | | * The effectiveness of the organisation in allocating responsibilities for budget management and control has been correctly and appropriately reviewed using a wide evidence base and a judgement made based on a combination of evidence and practice | | | |
| / 16  (min. of 8) | | Pass or Referral |
| AC 1.3  Review the effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | | |  | | |
| * The effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives has not been reviewed, or the review is incorrect or inappropriate, or the effectiveness of the organisation in relating budgets to clear objectives and outputs has merely been stated or described with no judgement made based on a combination of evidence and practice | | * The effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives has been correctly and appropriately reviewed and a judgement made based on a combination of evidence and practice, although the evidence base for the review is limited | | | * The effectiveness of the organisation in relating budgets to clear objectives and outputs to achieve the organisation’s objectives has been correctly and appropriately reviewed using a wide evidence base and a judgement made based on a combination of evidence and practice | | | |
| / 16  (min. of 8) | | Pass or Referral |
| AC 1.4  Recommend improvements to the organisation’s budgetary planning and implementation processes | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | | |  | | |
| * Recommended improvements to the organisation’s budgetary planning and implementation processes have not been made, or recommendations are incorrect or inappropriate, or recommendations are not based on a review of budgetary planning and implementation | | * Recommended improvements to the organisation’s budgetary planning and implementation processes are correct and appropriate and are based on a review of budgetary planning and implementation, although further development is required for full implementation | | | * Recommended improvements to the organisation’s budgetary planning and implementation processes are correct and appropriate and fully developed for implementation and are based on a review of budgetary planning and implementation | | | |
| / 16  (min. of 8) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
| **Learning Outcome / Section 2:** Understand how to measure and monitor performance against budgets and their objectives | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Review the organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives | **Referral [5/20]** | | **Pass [10/20]** | | | **Good Pass [15/20]** | | | |  | | |
| * The organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives have not been reviewed, or the review is incorrect or inappropriate, or the organisation’s systems, procedures and reporting mechanisms have merely been stated or described with no judgement made based on a combination of evidence and practice | | * The organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives have been correctly and appropriately reviewed and a judgement made based on a combination of evidence and practice, although the evidence base for the review is limited | | | * The organisation’s systems, procedures and reporting mechanisms that are used to monitor progress against budgets and their objectives have been correctly and appropriately reviewed using a wide evidence base and a judgement made based on a combination of evidence and practice | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 2.2  Recommend improvements to the measurement, monitoring and reporting of performance against budgets and their objectives | **Referral [*4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*12/16*]** | | | |  | | |
| * Recommended improvements to the measurement, monitoring and reporting of performance against budgets and their objectives have not been made, or recommendations are incorrect or inappropriate, or recommendations are not based on a review of the organisation’s systems, procedures and reporting mechanisms | | * Recommended improvements to the measurement, monitoring and reporting of performance against budgets and their objectives are correct and appropriate and are based on a review of the organisation’s systems, procedures and reporting mechanisms, although further development is required for full implementation | | | * Recommended improvements to the measurement, monitoring and reporting of performance against budgets and their objectives are correct and appropriate and are fully developed for implementation and are based on a review of the organisation’s systems, procedures and reporting mechanisms | | | |
| / 16  (min. of 8) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | |
|  | | | | | | | | | **/ 100** | | **TOTAL MARKS** | |

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| **Assessor’s Decision** | | **Quality Assurance Use** | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of Assessor:**  **Date of QA Check:** | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | **Signature of QA:**  **Date of QA check:** |

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| Title: | | **Managing projects in the organisation** | | |
| Level: | | 5 | | |
| Credit value: | | 4 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Be able to manage a project in an organisation | | | 1.1  1.2  1.3  1.4 | Assess the usefulness of project management tools and techniques for managing a project within own organisation  Plan the implementation of a project within own organisation  Communicate the project plans with appropriate colleagues and stakeholders, gaining agreement where necessary  Implement the project plan, monitoring progress against agreed targets |
| 1. Be able to evaluate own ability to manage a project | | | 2.1  2.2 | Use feedback from others to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses  Create a self-development plan to improve own performance in managing projects |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop understanding and ability to be able to manage projects as required by a practising or potential middle manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to MSC 2004 NOS: F1, F2 | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Management Standards Centre (MSC) | |
| Location of the unit within the subject/sector classification system | | | Business Management | |
| Unit guided learning hours | | | 18 | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Project sponsors, stakeholders and scope * Work breakdown and product breakdown structure * Gantt and bar charts, critical path analysis * Methods of reducing project times and costs * Resource analysis, and re-scheduling * Methods to monitor and evaluate project progress and final outcomes, including finance * Project communication methods * Links to change management * Information technology solutions * Benefits of project management * Key project management terminology * Characteristics of project managers * Organisational structures to support projects * Types of project; the project life cycle, PRINCE2 * Feasibility studies; risk management techniques * Project team roles; critical relationships * Procedures for project closure | | | |
| 2 | * Using feedback from others to critically evaluate own performance * Techniques for collecting and analysing feedback from others, including 3600 feedback * Personal development planning | | | |

**ASSIGNMENT TASK for Unit: Managing projects in the organisation**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to develop understanding and ability to be able to manage projects as required by a practising or potential middle manager.  **note**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  The nominal word count for this assignment is 2500 words: The suggested range is between 2000 and 3000 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Be able to manage a project in an organisation**  Assess project management tools and techniques using relevant criteria to make a judgement as to their usefulness for managing a project within own organisation.  You are then required to plan a project within own organisation using an appropriate project management tool and techniques; communicate the project plans to meet the identified communication needs of appropriate colleagues and project stakeholders, reaching agreement for the project where necessary, and then implement the project plan, monitoring progress against agreed targets. | | * Assess the usefulness of project management tools and techniques for managing a project within own organisation (20 marks) * Plan the implementation of a project within own organisation (20 marks) * Communicate the project plans with appropriate colleagues and stakeholders, gaining agreement where necessary (20 marks) * Implement the project plan, monitoring progress against agreed targets (20 marks) |
| **Be able to evaluate own ability to manage a project**  Use feedback from others to critically evaluate and identify strengths and areas for improvement in own ability to plan and implement a project, and then to create a self-development plan to improve own performance in managing projects based on the critical evaluation. | | * Use feedback from others to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses (12 marks) * Create a self-development plan to improve own performance in managing projects (8 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET –Managing projects in the organisation**

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| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | | |
| **Learning Outcome / Section 1:** Be able to manage a project in an organisation | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Assess the usefulness of project management tools and techniques for managing a project within own organisation | **Referral [ca. 5/*20*]** | | **Pass [*ca. 10/20*]** | | | **Good Pass [*ca. 15/20*]** | | | | |  | | |
| * The usefulness of project management tools and techniques for managing a project within own organisation is not addressed * Project management tools and techniques are assessed generically with no reference to their usefulness for managing a project within own organisation specifically * Project management tools and techniques are described rather than assessed with no judgement made as to their usefulness for managing a project within own organisation specifically | | * Project management tools and techniques are assessed rather than described and a judgement made as to their usefulness for managing a project within own organisation, although the criteria used may sometimes be limited or subjective | | | * A range of objective criteria are used to assess project management tools and techniques as to their usefulness for managing a project within own organisation | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 1.2  Plan the implementation of a project within own organisation | **Referral [ca. 5/*20*]** | | **Pass [*ca. 10/20*]** | | | **Good Pass [*ca. 15/20*]** | | | | |  | | |
| * The implementation of a project is not planned, or the planning is incorrect or incomplete, or the planning is generic with no reference to own organisation | | * The implementation of a project within own organisation is correctly planned using an appropriate project management tool and techniques, although some aspects of the implementation plan may be partial and not make full use of the capabilities of the project management tool and techniques used | | | * The implementation of a project within own organisation is correctly planned making full use of the capabilities of an appropriate project management tool and techniques | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 1.3  Communicate the project plans with appropriate colleagues and stakeholders, gaining agreement where necessary | **Referral [ca. 5/*20*]** | | **Pass [*ca. 10/20*]** | | | **Good Pass [*ca. 15/20*]** | | | | |  | | |
| * The project plans are not communicated, or the communications are inappropriate or incomplete, or there is no evidence that agreement for the project plans has been gained where necessary | | * The communication needs of appropriate colleagues and identified project stakeholders have been determined and the project plans are communicated appropriately to fulfil those communication needs, although the identification of communication needs is sometimes informal and subjective and a formal project communication plan may not be fully developed * Implicit or limited explicit evidence is provided that agreement has been reached for the project plans, where necessary, with appropriate colleagues and identified project stakeholders | | | * The communication needs of appropriate colleagues and identified project stakeholders have been formally and objectively determined, and the project plans are communicated appropriately to fulfil those communication needs using a fully-developed formal project communication plan * Explicit evidence is provided that agreement has been reached for the project plans, where necessary, with appropriate colleagues and identified project stakeholders | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 1.4  Implement the project plan, monitoring progress against agreed targets | **Referral [ca. 5/*20*]** | | **Pass [*ca. 10/20*]** | | | **Good Pass [*ca. 15/20*]** | | | | |  | | |
| * No implicit or explicit evidence is provided that the project plan is implemented, or is being implemented * There is no implicit or explicit evidence of monitoring progress against agreed targets | | * Implicit or limited explicit evidence is provided of implementing the project plan and monitoring progress against agreed targets | | | * Explicit evidence is provided of implementing the project plan and monitoring progress against agreed targets | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
| **Learning Outcome / Section 2:** Be able to evaluate own ability to manage a project | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Use feedback from others to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses | **Referral [ca. 3/12]** | | **Pass [*ca. 6/12*]** | | | **Good Pass [*ca. 9/12*]** | | | | |  | | |
| * No feedback has been used, or feedback from others is limited, inappropriate, or insufficient for a meaningful critical evaluation * Feedback relates to planning or implementing, but not both * Planning and implementing a project is merely described, with no use of feedback, or no use of appropriate feedback, to critically evaluate own ability and identify strengths and weaknesses | | * Appropriate and sufficient feedback has been used to critically evaluate and identify strengths and weaknesses in own ability to plan and implement a project, although the range of colleagues and project stakeholders providing feedback is limited but sufficient and/or feedback does not address the full scope of planning and implementation | | | * A wide range of colleagues and project stakeholders have provided comprehensive and objective feedback on all aspects of planning and implementation and this has been used to critically evaluate and identify strengths and weaknesses in own ability to plan and implement a project | | | | |
| / 12  (min. of 6) | | Pass or Referral |
| AC 2.2  Create a self-development plan to improve own performance in managing projects | **Referral [ca. 2/8]** | | **Pass [*ca. 4/8*]** | | | **Good Pass [*ca. 6/8*]** | | | | |  | | |
| * No self-development plan is created, or the self-development plan is inappropriate or incomplete, or the self-development plan is not based on the critical evaluation | | * An appropriate and complete self-development plan to improve own performance in managing projects is created and is based on the critical evaluation, although self-development objectives are not be prioritised or ranked | | | * An appropriate and comprehensive self-development plan to improve own performance in managing projects is created that prioritises and ranks self-development objectives based on the critical evaluation | | | | |
| / 8  (min. of 4) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
|  | | | | | | | | | **/ 100** | | | **TOTAL MARKS** | |
| **Assessor’s Decision** | | | | | **Quality Assurance Use** | | | | | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date of QA Check:** | | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | | | **Signature of QA:**  **Date of QA check:** | | | |

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| Title: | | **Making professional presentations (M5.27)** | | |
| Level: | | 5 | | |
| Credit value: | | 2 | | |
| Learning outcomes (the learner will) | | | Assessment criteria (the learner can) | |
| 1. Be able to plan a professional presentation | | | 1.1  1.2  1.3  1.4  1.5 | Identify the aims and objectives of the presentation  Identify the intended audience for the presentation, assessing their level of understanding of the presentation topic  Research, evaluate and select information on the presentation topic  Plan the content and structure of the presentation and prepare visual aids and any other materials required for the presentation  Prepare the location and any equipment required for the presentation |
| 1. Be able to deliver a professional presentation | | | 2.1  2.2 | Present your subject matter supported by facts at an appropriate level of understanding for the audience  Respond appropriately to questions from the audience |
| 1. Be able to evaluate own ability to make professional presentations | | | 3.1  3.2  3.3 | Use feedback from the audience to evaluate own ability to plan and structure a professional presentation  Use feedback from the audience to evaluate own ability to deliver a professional presentation  Implement improvements to own professional presentations |
| **Additional information about the unit** | | |  | |
| Unit purpose and aim(s) | | | To develop knowledge and understanding of making professional presentations as required by a practising or potential middle manager. | |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | | | Links to MSC 2004 NOS | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | | |  | |
| Support for the unit from a sector skills council or other appropriate body (if required) | | | Management Standards Centre (MSC) | |
| Location of the unit within the subject/sector classification system | | | Business Management | |
| Unit guided learning hours | | | 9 | |
| **Additional Guidance about the Unit** | | | | |
| **Indicative Content:** | | | | |
| 1 | * Relevance of objectives, audience and contexts in relation to presentations * Understanding the level of knowledge and expectations of the audience * Research, evaluation and logical grouping of valid and relevant information * Difference between fact and opinion * Options and constraints applicable to presentation such as time, duration, venue, equipment, language * Use of standard computer software, such as Microsoft PowerPoint * Non-IT visual aids for presentations such as OHTs, models, handouts | | | |
| 2 | * Presentation techniques * Techniques for effective and flexible delivery * Techniques for controlling and responding to questions | | | |
| 3 | * Evaluation techniques (self and others) and performance improvement | | | |

**ASSIGNMENT TASK for: Making professional presentations**

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| **Centre Number** | **Centre Name** | |
| **Learner Registration No** | **Learner Name** | |
| **TASK**  The purpose of this unit is to develop knowledge and understanding of making professional presentations as required by a practising or potential middle manager.  **note**  An ILM Assessment Task provides an opportunity to relate your learning directly to your current organisation. It is recommended that you discuss the assignment with your line manager to explore and agree how the task could be used to support the needs of your employer (as well as evidencing your learning as part of completing your ILM qualification).  If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity  The nominal word count for this assignment is 2500 words: The suggested range is between 2000 and 3000 words, however individuals have different writing styles, and there is no penalty if the word-count range is exceeded. | | |
| *Please use the headings shown below when writing up your assignment* | | **Assessment Criteria** |
| **Be able to plan a professional presentation**  Identify aims and objectives for the presentation and to identify the intended audience and assess their level of understanding of the topic.  The presentation topic must then be researched and information evaluated to select information that is correct and appropriate for the presentation topic and the level of understanding of the intended audience, and the content and structure of the presentation planned correctly and appropriately for a professional presentation.    You are then required to prepare visual aids and any other materials required for the presentation and to ensure that the location and any equipment required for the presentation is prepared and complete, and that seating arrangements, positioning of any required equipment and any other relevant factors have been taken into account. | | * Identify the aims and objectives of the presentation (4 marks) * Identify the intended audience for the presentation, assessing their level of understanding of the presentation topic (4 marks) * Research, evaluate and select information on the presentation topic (16 marks) * Plan the content and structure of the presentation and prepare visual aids and any other materials required for the presentation (16 marks) * Prepare the location and any equipment required for the presentation (4 marks) |
| **Be able to deliver a professional presentation**  Deliver a professional presentation, ensuring that the subject matter is supported by facts and is presented in a suitable manner and at an appropriate level of understanding for the audience.  You need to ensure that the audience is engaged and that learning is taking place, and that responses to questions from the audience are appropriate, complete and correct and demonstrate good understanding of the topic | | * Present your subject matter supported by facts at an appropriate level of understanding for the audience (20 marks) * Respond appropriately to questions from the audience (8 marks) |
| **Be able to evaluate own ability to make professional presentations**  Use feedback from the audience to support a meaningful evaluation and provide conclusions or recommendations as to your ability to plan, structure and deliver a professional presentation, and then to use this evaluation to implement improvements to your professional presentations. | | * Use feedback from the audience to evaluate own ability to plan and structure a professional presentation (12 marks) * Use feedback from the audience to evaluate own ability to deliver a professional presentation (12 marks) * Implement improvements to own professional presentations (4 marks) |
| By submitting I confirm that this assessment is my own work | | |

**MARK SHEET –Making professional presentations**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Centre Number :** | |  | | **Centre Name :** | | |  | | | | | | |
| **Learner Registration No :** | |  | | **Learner Name:** | | |  | | | | | | |
| **INSTRUCTIONS FOR ASSESSMENT AND USE OF MARK SHEET**  Assessment must be conducted with reference to the assessment criteria (AC). In order to pass the unit, every AC must be met.  Assessors will normally award marks for every AC and then total them into a percentage. However, for greater simplicity, there is the option to not use marks at all and merely indicate with a ‘Pass’ or ‘Referral’ in the box (below right). In order to pass the unit every AC must receive a ‘Pass’  **Where marks are awarded according to the degree to which the learner’s evidence in the submission meets each AC, every AC must be met, i.e. receive at least half marks (e.g. min 10/20). Any AC awarded less than the minimum produces an automatic referral for the submission (regardless of the overall mark achieved).**  Sufficiency descriptors are provided as guidance. If 20 marks are available for an AC and the evidence in the submission approximates to the ‘pass’ descriptor, that indicates it should attract 10 marks out of 20, if a ‘good pass’ then ca. 15 out of 20. The descriptors are not comprehensive, and cannot be, as there are many ways in which a submission can exceed or fall short of the requirements. | | | | | | | | 1. **Learner named above confirms authenticity of submission.** 2. **ILM uses learners’ submissions – on an anonymous basis – for assessment standardisation.  By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.**   **However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □** | | | | | |
| **Learning Outcome / Section 1:** Be able to plan a professional presentation | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 1.1  Identify the aims and objectives of the presentation | **Referral [*ca. 1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [*ca. 3/4*]** | | | | |  | | |
| * Aims and objectives are not identified, or are incorrect or inappropriate * Aims or objectives are identified, but not both * There is confusion or ambiguity as to the difference between aims and objectives | | * Aims and objectives are correctly identified, although imprecise | | | * Aims and objectives are clearly and precisely and correctly identified | | | | |
| / 4  (min. of 2) | | Pass or Referral |
| AC 1.2  Identify the intended audience for the presentation, assessing their level of understanding of the presentation topic | **Referral [*ca. 1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [*ca. 3/4*]** | | | | |  | | |
| * The intended audience is not identified * The intended audience has been identified but no assessment has been made to make a judgement as to their level of understanding of the topic, or their understanding of the topic has merely been described with no judgement made as to level | | * The intended audience is identified and an assessment made using appropriate criteria to make a judgement as to their level of understanding of the topic, although the assessment may sometimes be subjective or made on limited evidence | | | * The intended audience is identified and an assessment made using a range of objective evidence and appropriate criteria to make a judgement as to their level of understanding of the topic | | | | |
| / 4  (min. of 2) | | Pass or Referral |
| AC 1.3  Research, evaluate and select information on the presentation topic | **Referral [*ca. 4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*ca. 12/16*]** | | | | |  | | |
| * No evidence is provided that the presentation topic has been researched and information evaluated and selected that is correct and appropriate for the presentation topic and the level of understanding of the intended audience, or information has merely been selected with no evidence of it being evaluated for relevance to the topic or the level of understanding of the intended audience * The selected information is insufficient, incorrect, inappropriate or at the wrong level for the presentation topic or the intended audience | | * Evidence is provided that the presentation topic has been researched and information evaluated to select sufficient information that is correct and appropriate for the presentation topic and the level of the intended audience, although the research and evaluation may be limited in comparison to the scope of the topic | | | * Evidence is provided that the presentation topic has been comprehensively researched and information evaluated to select a range of information that fully meets the scope of the presentation topic and that it is correct and appropriate for the presentation topic and the level of the intended audience | | | | |
| / 16  (min. of 8) | | Pass or Referral |
| AC 1.4  Plan the content and structure of the presentation and prepare visual aids and any other materials required for the presentation | **Referral [*ca. 4/16*]** | | **Pass [*8/16*]** | | | **Good Pass [*ca. 12/16*]** | | | | |  | | |
| * Content and structure is not planned, or the planning is incomplete, incorrect or inappropriate for the presentation topic or the intended audience, or the plan does not adhere to previously negotiated or agreed time constraints * Aims and objectives are not included in the plan, or: * the main points of the presentation are not clearly defined in the plan * the main points of the presentation are not in a logical sequence * the plan does not provide a clear introduction and a conclusion or summary that is linked to the aims and objectives of the presentation * There is no evidence provided that visual aids and any other materials required for the presentation are prepared, or the visual aids and/or other materials are incomplete or inappropriate or are not relevant to the particular point being made, or the use of visual aids and/or other materials is excessive | | * Planning of content and structure is limited but sufficient, and is correct and appropriate with a clear beginning, middle and end, and adheres to previously negotiated or agreed time constraints * Evidence is provided that appropriate and completed visual aids and any other materials required for the presentation are prepared and that the use of visual aids is not excessive, although some additional work may be required to ensure that all visual aids and any other materials are of a professional standard | | | * Planning of content and structure is complete, correct and appropriate with a clear beginning, middle and end, and adheres to previously negotiated or agreed time constraints: * Aims and objectives are included in the plan, and: * the main points of the presentation are clearly defined in the plan * the main points of the presentation are in a logical sequence * the plan provides a clear introduction and a conclusion or summary that is linked to the aims and objectives of the presentation * Evidence is provided that all appropriate and completed visual aids and any other materials required for the presentation are prepared to a professional standard and that the use of visual aids is not excessive | | | | |
| / 16  (min. of 8) | | Pass or Referral |
| AC 1.5  Prepare the location and any equipment required for the presentation | **Referral [*ca. 1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [*ca. 3/4*]** | | | | |  | | |
| * There is no evidence provided that the location and any equipment required for the presentation is prepared, or preparation is incomplete and does not take account of seating arrangements and positioning of any required equipment and any other relevant factors, or the seating arrangements and positioning of any required equipment and any other relevant factors are incorrect or inappropriate | | * Evidence is provided that the location and any equipment required for the presentation is prepared and complete, and seating arrangements, positioning of any required equipment and any other relevant factors have been taken into account * There is limited consideration of the actions to be taken should there be any unforeseen problems with the visual aids or other materials or with the location or equipment | | | * Evidence is provided that the location and any equipment required for the presentation is prepared and complete, and seating arrangements, positioning of any required equipment and any other relevant factors have been taken into account * Plans are provided of the actions to be taken should there be any unforeseen problems with the visual aids or other materials or with the location or equipment | | | | |
| / 4  (min. of 2) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
| **Learning Outcome / Section 2:** Be able to deliver a professional presentation | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 2.1  Present your subject matter supported by facts at an appropriate level of understanding for the audience | **Referral [*ca. 5/20*]** | | **Pass [*10/20*]** | | | **Good Pass [*ca. 15/20*]** | | | | |  | | |
| * Subject matter is not presented at an appropriate level of understanding for the audience and/or is not supported by facts * There is no evidence that the audience is engaged or that learning is taking place, or the pace of the presentation is inappropriate for presenting the subject matter | | * Subject matter is presented at an appropriate level of understanding for the audience and is supported by facts, although the facts may not always be fully referenced * There is evidence that the audience is engaged and that learning is taking place, although some points made in the presentation could have been made clearer or presented in a different way and/or the pace of the presentation is not always appropriate for the subject matter | | | * There is comprehensive evidence that the audience is engaged and that learning is taking place * All points made in the presentation have been made clear or have been presented in the most appropriate way and the pace of the presentation is always appropriate for the subject matter | | | | |
| / 20  (min. of 10) | | Pass or Referral |
| AC 2.2  Respond appropriately to questions from the audience | **Referral [*ca. 2/8*]** | | **Pass [*4/8*]** | | | **Good Pass [*ca. 6/8*]** | | | | |  | | |
| * Questions from the audience are not responded to, or responses are inappropriate, incomplete or incorrect and do not demonstrate sufficient or good understanding of the topic | | * Responses to questions from the audience are limited but sufficient and appropriate and demonstrate good understanding of the topic | | | * Responses to questions from the audience are detailed, appropriate, complete and correct and demonstrate comprehensive understanding of the topic | | | | |
| / 8  (min. of 4) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
| **Learning Outcome / Section 3:** Be able to evaluate own ability to make professional presentations | | | | | | | | | | | | | |
| **Assessment Criteria (AC)** | **Sufficiency Descriptors**  *[Typical standard that , if replicated across the whole submission, would produce a referral, borderline pass or good pass result]* | | | | | | | | | | **Assessor feedback on AC**  *[comments not necessary in every box]* | | |
| AC 3.1  Use feedback from the audience to evaluate own ability to plan and structure a professional presentation | **Referral [*ca. 3/12*]** | | **Pass [*6/12*]** | | | **Good Pass [*ca. 9/12*]** | | | | |  | | |
| * No feedback from the audience has been used * Feedback is too generic, too descriptive, or too limited to support a meaningful evaluation and provide conclusions or recommendations as to own ability to plan and structure a professional presentation | | * Sufficient feedback from the audience has been used to support a meaningful evaluation and provide conclusions or recommendations as to own ability to plan and structure a professional presentation, although: * the feedback may sometimes be subjective * the criteria used for the evaluation may not address the full scope of planning and structuring a professional presentation * the methodology used for collecting and evaluating feedback is not fully planned | | | * A systematic and appropriate methodology that addresses the full scope of planning and structuring a professional presentation has been used to collect and evaluate objective feedback from the audience to support a meaningful evaluation and provide conclusions or recommendations as to own ability to plan and structure a professional presentation | | | | |
| / 12  (min. of 6) | | Pass or Referral |
| AC 3.2  Use feedback from the audience to evaluate own ability to deliver a professional presentation | **Referral [*ca. 3/12*]** | | **Pass [*6/12*]** | | | **Good Pass [*ca. 9/12*]** | | | | |  | | |
| * No feedback from the audience has been used * Feedback is too generic, too descriptive, or too limited to support a meaningful evaluation and provide conclusions or recommendations as to own ability to deliver a professional presentation | | * Sufficient feedback from the audience has been used to support a meaningful evaluation and provide conclusions or recommendations as to own ability to deliver a professional presentation, although: * the feedback may sometimes be subjective * the criteria used for the evaluation may not address the full scope of delivering a professional presentation * the methodology used for collecting and evaluating feedback is not fully planned | | | * A systematic and appropriate methodology that addresses the full scope of delivering a professional presentation has been used to collect and evaluate objective feedback from the audience to support a meaningful evaluation and provide conclusions or recommendations as to own ability to deliver a professional presentation | | | | |
| / 12  (min. of 6) | | Pass or Referral |
| AC 3.3  Implement improvements to own professional presentations | **Referral [*ca. 1/4*]** | | **Pass [*2/4*]** | | | **Good Pass [*ca. 3/4*]** | | | | |  | | |
| * No implicit or explicit evidence is provided that improvements to own professional presentations are, or are being, implemented, or improvements are not based on the evaluations | | * Implicit or limited explicit evidence is provided that improvements to own professional presentations based on the evaluations are, or are being, implemented | | | * Explicit evidence is provided that improvements to own professional presentations based on the evaluations are, or are being, implemented | | | | |
| / 4  (min. of 2) | | Pass or Referral |
| **Section comments** (optional): | | | | | **Verification comments** (optional): | | | | | | | | |
|  | | | | | | | | | **/ 100** | | | **TOTAL MARKS** | |
| **Assessor’s Decision** | | | | | **Quality Assurance Use** | | | | | | | | |
| **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | **Signature of Assessor:**  **Date of QA Check:** | | | **Outcome** (*delete as applicable*): **PASS / REFERRAL** | | | | | **Signature of QA:**  **Date of QA check:** | | | |