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| City & Guilds Level 7 Diploma for Senior Leaders (8431-31/33/63) |

February 2022Version 2.0

Qualification at a glance

|  |  |
| --- | --- |
| Subject Area | Leadership & Management |
| ILM Number | 8431-31 – Full Payment route  8431-33 – Unit Payment route  8431-63 – Dual Accreditation route |
| Age Group Approved | 18+ |
| Entry Requirements | Active within a Senior Leader role |
| Assessment | Portfolio and/or Unit Assignments |
| Approvals | Available from 1 September 2021 |
| Apprenticeship Standard | [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1) |
| Registration & Certification | Consult the [Walled Garden/Online Catalogue](https://www.walled-garden.com) |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Title & Level | | ILM Number | Ofqual Accreditation Number | GLH | | TQT |
| City & Guilds Level 7 Diploma for Senior Leaders | | 8431-31/33/63 | 603/7778/1 | 547 | | 1,001 |
|  | |  |  |  | |  |
| Version & Date | Change Detail | | | | Section | |
| v1.0 September 2021 | Handbook created | | | |  | |
| v2.0 February 2022 | Removed academic assignment from suggested work product list  Reflected IfATE additions to KSBs: references to sustainability added to Depth. (No amendments to Assessment Criteria):  Unit 705 AC2.1 (K8)  Unit 702 AC1.2 (S6)  Unit 706 (AC2.1, 2.2, 2.3 (S12)  Added additional explanation of referral to Results Sheets | | | | 5. Portfolio Guidance  8. Units  Appendix E | |

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1 Introduction

This document tells you what you need to do to deliver the qualification:

|  |  |
| --- | --- |
| Area | Description |
| Who is the **qualification** for? | Active Senior Leaders who need to be able to provide clear, inclusive, and strategic leadership and direction relating to their area of responsibility within an organisation. |
| What does the qualification cover? | This qualification allows learners to develop and practise the skills required by a Senior Leader.  It supports on-programme delivery for [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1). |
| What opportunities for progression are there? | This qualification may provide access to Higher Education. |
| Who did we develop the qualification with? | Leadership and Management subject matter experts, Higher Education Institutions, and ILM customers. |
| Is it part of an apprenticeship pathway? | This qualification provides full coverage for on-programme delivery of the Apprenticeship which has been created by the employer-led Trailblazer group. |

Structure

To achieve the City & Guilds Level 7 Diploma for Senior Leaders learners must pass allseven units.

|  |  |  |  |
| --- | --- | --- | --- |
| **ILM unit number** | **Unit title** | **Level** | **Guided Learning Hours (GLH)** |
| 8431-700 | Building a High Performance Team | 7 | 182 |
| 8431-701 | Strategic Leadership | 7 | 55 |
| 8431-702 | Strategic Change Management | 7 | 89 |
| 8431-703 | Organisational Values & the Strategic Context | 7 | 95 |
| 8431-704 | Strategic Influencing & Negotiating | 7 | 46 |
| 8431-705 | Strategic Data Analysis | 7 | 47 |
| 8431-706 | Strategic Workforce & Logistics Planning | 7 | 33 |

Total Qualification Time

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

TQT is comprised of the following two elements:

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

Extract from Ofqual: *Total Qualification Time Criteria for All Qualifications*

| **Title and level** | **GLH** | **TQT** |
| --- | --- | --- |
| City & Guilds Level 7 Diploma for Senior Leaders | 547 | 1,001 |

The Guided Learning Hours (GLH) and TQT are based on unitised delivery and can be reduced through holistic delivery. See [Appendix A](#AppendixAGuidanceforDelivery) for guidance on how content could be delivered efficiently.

2 Centre Requirements

Approval

Centres must be approved by ILM to offer this qualification before commencing delivery. Centres should liaise with their Account Manager to obtain approval.

To offer this qualification new Centres will need to gain both Centre and Qualification approval. Centre staff must familiarise themselves with the structure, content, and assessment requirements of the qualification before designing a course programme. Please refer to the *City & Guilds/ILM Quality Assurance Standards,* *Centre Document Library,* and *Centre Approval Process* documents for further information.

Once approved, the qualification will be listed on a Centre’s Walled Garden Catalogue.

Centre Staffing Requirements

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

* Be occupationally competent or technically knowledgeable in the area(s) for which they are delivering training and/or have experience of providing training. This knowledge must be to at least the same level as the training being delivered.
* Have recent relevant experience in the specific area they will be assessing.
* Have credible experience of providing training.

Centre staff may undertake more than one role, e.g., Tutor and Assessor or Internal Quality Assurer but cannot internally quality assure their own assessments.

Further information is available in the *City & Guilds/ILM Quality Assurance Standards, Centre Document Library,* and *Centre Approval Process* documents.

Learner Entry Requirements

Centres must ensure that learners have the potential and opportunity to gain the qualification successfully. As this qualification is work-based, learners must be in a Senior Leader role which will enable them to fulfil the requirements of this qualification.

Age Restrictions

City & Guilds cannot accept registrations for learners under 18 as these qualifications are not approved for under 18s.

Time Constraints

Qualification registration is valid for three years.

3 Delivering the Qualification

Initial Assessment

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

* If the learner has any specific training needs.
* The appropriate type and level of qualification.
* Support and guidance they may need when working towards their qualification.
* Any units they have already completed which are relevant to the qualification.

Centres are required to demonstrate commitment to equal opportunities when recruiting learners. The *City & Guilds/ILM Centre Document Library* has guidance on making arrangements for learners requiring reasonable adjustments or special considerations in respect of assessment. This should be done as early as possible in the programme and needs to be approved by ILM before implementation.

Induction

Centres must provide an induction so learners fully understand the requirements of the qualification, their responsibilities as a learner, and the responsibilities of the Centre. This information can be recorded on a learning contract.

Each programme must start with an induction, which must be supported by written information for learners covering:

* An outline of the qualification and the related learner support available.
* The aim of the City & Guilds ILM Level 7 Diploma for Senior Leaders.
* Expectations of, and benefits to, the learner and where relevant, their employer.
* Format of the programme – content, hours, attendance, delivery methods, etc.
* The Assessment Criteria, including the Assessment Requirements (Sufficiency).
* Roles and responsibilities of Centre staff, learners and ILM.
* Learning and study skills, including reference to use of library, internet and any open or online learning to be used, and access to The Institute of Leadership & Management Studying Membership and benefits.
* Information on tutorial support, advice and guidance, equal opportunities, appeals procedures, authenticity, and plagiarism.

Recommended for this qualification:

|  |  |
| --- | --- |
| Induction | Tutorial Support |
| Two hours induction | At least eight hours of tutorial support as part of the Guided Learning Hours (GLH). |

Guidance for Delivery

The Guided Learning Hours (GLH) and TQT are based on unitised delivery and can be reduced through holistic delivery. See [Appendix A](#AppendixAGuidanceforDelivery) for guidance on how content could be delivered efficiently.

Each unit also includes suggested delivery methods.

Support Materials

|  |  |
| --- | --- |
| Description | How to access |
| Studying Membership from The Institute of Leadership of Management: Learning resources, diagnostic tools, Edge Magazine | [www.institutelm.com](http://www.institutelm.com) |

Email updates

Sign up to receive tailored emails covering ILM updates and events: [www.i-l-m.com/trainers-and-centres/email-updates](http://www.i-l-m.com/trainers-and-centres/email-updates)

Suggested Learning Resources (General)

The following resources could be used to support learning in all of the subject areas:

* Studying membership of The Institute of Leadership & Management.
* E Journals - Sage, EBSCO.
* Professional Body Learning Resources.
* Company and Industry Sector Reports.

Suggested Learning Resources (Units)

These suggestions are current at the time of publication.

The following resources are provided as guidance only. Centres should select current and relevant resources and encourage learners in self-guided reading.

8431-700 Building a High Performance Team

Bespoke Resources:

* Diagnostic and psychometric tests e. g. Skills Gap Analysis, Skills Scans, Leadership Style, Team Balance, Emotional Intelligence, Coaching and Mentoring Models and Diagnostics

 Source Text:

* Cooper, C. and Hesketh, I. (2019). Wellbeing at Work: How to Design, Implement and Evaluate an Effective Strategy. London: Kogan Page/CIPD
* Cox, E., Bachkirova, T. and Clutterbuck, D. (2018). The Complete Handbook of Coaching. London: SAGE Publication
* Munde J. et al (2020) Role of Corporate Mentoring in Talent Development,
* Stanford, N. (2018). Organization design (The practitioner’s guide). Abingdon, Oxon.: Routledge.

8431-701 Strategic Leadership

Source Text:

* Lewis, S. (2016). Positive Psychology and Change: How Leadership, Collaboration and Appreciative Inquiry Create Transformational Results. Wiley-Blackwell
* Quirke, B. (2017). Making the connections: Using internal communication to turn strategy into action. Routledge.
* Schein, E. and Schein, P. (2017). Organizational culture and leadership, 5th ed. San Francisco: Jossey- Bass.
* Stowell, Steven J., and Stephanie S. Mead (2016). The Art of Strategic Leadership: How Leaders at All Levels Prepare Themselves, Their Teams, and Organizations for the Future. Hoboken, New Jersey: John Wiley & Sons
* Wallin, Johan (2016). Business Orchestration: Strategic Leadership in the Era of Digital Convergence. Chichester, England; Wiley

8431-702 Strategic Change Management

Source Text:

* Burnes, B. (2017). Managing Change. 7th ed. Harlow, Pearson
* Manners-Bell, J. (2017). Supply Chain Ethics: Using CSR and Sustainability to Create Competitive Advantage. London: Kogan Page
* Stanford, N. (2018). Organization design (The practitioner’s guide). Abingdon, Oxon.: Routledge.

8431-703 Organisational Values & the Strategic Context

Source Text:

* Ambrosini, V., Jenkins, M. and Mowbray, N. (2015). Advanced Strategic Management: A multi- perspective approach. Palgrave McMillan Higher Education
* Armstrong, P. (2017). Disruptive technologies: Understand, Evaluate, Respond. Kogan Page
* Blackburn, W.R. (2016). The Sustainability Handbook: The Complete Management Guide to Achieving Social, Economic and Environmental Responsibility. Abingdon, Oxon: Routledge
* Tricker, B. (2015). Corporate Governance: Principles, Policies, and Practices 3rd ed. Oxford: Oxford University Press.

8431-704 Strategic Influencing & Negotiating

Source Text:

* Deephouse, David L., Naomi A. Gardberg, and William Newburry. Global Aspects of Reputation and Strategic Management. First edition. Bingley, UK: Emerald Publishing, 2019
* Khan, Mohammad Ayub., and Noam. Ebner. The Palgrave Handbook of Cross-Cultural Business Negotiation. Cham: Springer International Publishing, 2019.
* O’Brien, J. (2016). Negotiation for Procurement Professionals: A Proven Approach that Puts the Buyer in Control. 2nd ed. London: Kogan Page.

8431-705 Strategic Data Analysis

Source Text:

* Bell, E. Bryman, A and Harley, B. (2018). Business Research Methods. 5th ed. Oxford: Oxford University
* Kalyvas, James R., Michael R. Overly, and Matthew A. Karlyn. Big Data: A Business and Legal Guide. London: CRC Press, 2019
* Giudici, Paolo., Salvatore. Ingrassia, and Maurizio. Vichi. Statistical Models for Data Analysis. Heidelberg: Springer International Publishing, 2013

8431-706 Strategic Workforce & Logistics Planning

Source Text:

* Chopra, S. (2019). Supply Chain Management: Strategy, Planning and Operation. 7th ed. Harlow: Pearson Education
* Disselkamp, Lisa (2013). Workforce Asset Management Book of Knowledge. Hoboken, New Jersey: Wiley
* Gibson, A., (2021) Agile Workforce Planning: How to Align People with Organizational Strategy for Improved Performance: Kogan Page
* Johnsen, T.E., Howard, M. and Miemczyk, J. (2019). Purchasing and Supply Chain Management. 2nd ed. Abingdon: Routledge.
* Tardieu, Hubert. et al. (2020) Deliberately Digital Rewriting Enterprise DNA for Enduring Success. Cham: Springer

4 Assessment

Assessment Methods

Centres can decide whether to assess each unit by Portfolio or Unit Assignment:

* Portfolio – evidence across one or more units.
* Unit Assignment – structured evidence for a single unit.

Learners must complete a Portfolio and/or Unit Assignments which cover all the Assessment Criteria **and** the Assessment Requirements, providing evidence of their knowledge, skills and behaviours in real situations. Scenarios/simulations to demonstrate skills and behaviours are not accepted because they do not support a learner demonstrating their competence.

The qualification is graded Pass or Referral (not yet competent). To achieve a Pass for the qualification the learner must Pass all seven units.

| ILM Unit Number | Unit Title | Assessment Method | Assessment Material Locations |
| --- | --- | --- | --- |
| 8431-700 | Building a High Performance Team | Portfolio and/or Unit Assignments | This Qualification Handbook:   * Portfolio guidance in [Section 5](#Section5Portfolio), and each Unit ([Section 8](#Section8Units)). * Unit Assignments guidance in [Section 6](#Section6AssignmentsGuidance), and [Appendix C](#AppendixCAssignments). |
| 8431-701 | Strategic Leadership |
| 8431-702 | Strategic Change Management |
| 8431-703 | Organisational Values & the Strategic Context |
| 8431-704 | Strategic Influencing & Negotiating |
| 8431-705 | Strategic Data Analysis |
| 8431-706 | Strategic Workforce & Logistics Planning |

Assessment Strategy

All units in this qualification are initially assessed by the Centre and subject to internal and external quality assurance.

Assessment decisions can only be determined as Pass or Referral. The only acceptable reason for a referral is a failure to meet one or more Assessment Criteria.

To Pass each unit the learner **must satisfy all Assessment Criteria and Assessment Requirements** by providing sufficient and valid evidence of their own creation. Centres must ensure that learners have access to the Assessment Criteria and Assessment Requirements.

ILM Assessment Terminology (Verbs)

The Assessment Criteria include a range of verbs. Definitions are available on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](http://www.i-l-m.com/assessment-and-resources/assessment-guidance)

Authenticity

The learner must complete and sign a Declaration of Authenticity when submitting their Portfolio and/or Unit Assignments to the Centre. A blank declaration form can be found in the *City & Guilds/ILM Centre Document Library*.

Results Sheets

Result Sheets are a key auditable document found in [Appendix E](#AppendixEResultsSheets) of this Qualification Handbook. The sheets can be used for both the Unit Assignments and Portfolio. Centres may use their own version of Results Sheets as long as the same information is provided.

Assessors must provide a rationale for their assessment decision in the Results Sheet. Feedback should be rich and contextualised.

Recognition of Prior Learning (RPL)

Recognition of prior learning means using previous experience or qualifications to contribute to a new qualification. RPL is allowed for this qualification.

Results Entry on Walled Garden

Walled Garden is the online portal for entering registrations and assessment results. For full instructions on using Walled Garden go to www.i-l-m.com/trainers-and-centres/walledgarden

When entering results, the assessment type will appear as ‘Portfolio.’ Unit Assignment results can also be entered under the ‘Portfolio’ assessment type.

Certificates

A printed certificate will be issued to each successful learner for units and the full qualification.

E-Certificates are a complimentary service for all City & Guilds/ILM qualifications enabling customers to view and download PDF versions of certificates.

Digital Credentials

A digital credential is a visual representation of knowledge and skills, and is issued online for the full qualification only, making it easy for individuals to demonstrate their competencies to employers, clients, and peers. Each digital credential has a unique URL that can be shared electronically via social media, in an email signature, and on a CV.

Should the learner wish to receive a digital credential on successful completion of this qualification, as part of the registration process Centres must ensure that the learner’s unique email address is added. This will allow ILM to issue the credential directly to them. This is a complimentary service in addition to the paper certificate.

5 Assessment Guidance: Portfolio

The Portfolio is intended to be holistic, for example one piece of evidence may be provided against multiple Assessment Criteria and across more than one unit. It is not necessary for learners to have a separate piece of evidence for each Assessment Criteria.

**When compiling their Portfolio learners must refer to the Assessment Criteria and Assessment Requirements (Sufficiency) to understand the evidence required.**

Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](http://www.i-l-m.com/assessment-and-resources/assessment-guidance)

Evidence of skills applied in real-work situations is required; scenarios/simulations to demonstrate skills and behaviours are not accepted because they do not support a learner demonstrating their competence.

Where demonstrating knowledge, a learner may refer to an organisation they are familiar with, as an alternative to their current organisation.

The Portfolio for this qualification will be a range of materials and documents generated over the period of the qualification which demonstrate knowledge and application of leadership and management concepts.

The Portfolio must be provided electronically, unless agreed otherwise under the Special Consideration policy.

**Apprenticeship End-point Assessment (EPA):** Where this qualification is taken as part of the Level 7 Senior Leader Apprenticeship, learners must review the specific requirements of the EPA assessment methods to ensure compliance.

Types of Evidence

Types of evidence could be:

* Work products, such as:
* Performance reviews.
* Project plans and documentation.
* Reports.
* Minutes of meetings.
* Demonstrations.
* Presentations.
* Research projects.
* Video or audio extracts, such as professional discussions. It is essential that the Assessor can easily identify the key pertinent points within the recording:
  + Where a criterion is being met it must be identified in the Evidence Matrix, e.g., can be found from four minutes within the recording (timestamped)
  + Which individual is the learner – an introduction at the beginning of each recording identifying who is involved and the date of the recording. This could be further supported with an annotated or written summary.
* Witness testimony from a reliable, authentic witness giving their account of what the learner has carried out in their job role. Statements must be dated and signed by the witness and include their relationship to the learner.
  + Feedback must focus only on direct observation of evidence rather than opinions.

Evidence must be clear and unambiguous – an initial profile page and supporting context statements are recommended to support evidence that doesn’t stand alone.

Evidence should not:

* Include case studies/simulated evidence.
* Include reflective accounts by the learner
* Require access to hyperlinks.

Selecting Evidence

All evidence must be of the learner’s own work and any teamwork presented must clarify and focus on the learner’s contribution.

The Guidance for Delivery in [Appendix A](#AppendixAGuidanceforDelivery) may help learners understand where evidence can be used for multiple Assessment Criteria.

In summary, there are two questions that a learner should consider when selecting work for their Portfolio:

* Which pieces holistically (most efficiently) provide evidence that together cover multiple Assessment Criteria?
* Is this the best evidence I have, showing that I have met all of the Assessment Criteria **and** Assessment Requirements?

Preparing Evidence

Evidence must be presented as follows:

* With a header or footer containing the learner’s name, the date the evidence was produced, and an evidence reference number.
* The content of the Portfolio must be mapped to the relevant Assessment Criteria using an Evidence Matrix such as provided in [Appendix D](#AppendixDPortfolioMatrix).
* External sources must be clearly referenced using a recognised system.

Confidentiality and data protection requirements must be adhered to, e.g., permissions for use of video/images containing identifiable individuals (such as colleagues and clients), anonymisation of documentation, and permission when submitting sensitive information.

6 Assessment Guidance: Unit Assignments

Unit Assignments provide learners with a structure for presenting their evidence for a single unit. They can be found in [Appendix C](#AppendixCAssignments).

The Unit Assignments each cover the Learning Outcomes and Assessment Criteria for one unit.

**When completing their assignment learners must refer to the Assessment Criteria and Assessment Requirements (Sufficiency) to understand the evidence required.**

Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](http://www.i-l-m.com/assessment-and-resources/assessment-guidance)

Evidence of skills applied in real-work situations is required; scenarios/simulations to demonstrate skills and behaviours are not accepted because they do not support a learner demonstrating their competence.

The Unit Assignments are designed for use by learners from any industry.

Where demonstrating knowledge, a learner may refer to an organisation they are familiar with, as an alternative to their current organisation.

Assignments can be in written form, recorded Presentation, or a recorded Professional Discussion. Learners can combine all three methods in a Unit Assignment. Supporting work-product evidence should be included in Appendices/Annexes.

Typical word counts and timings reflect the expectation that learners can produce concise evidence. Where assessment methods are combined word counts and timings should be adjusted proportionately.

**Apprenticeship End-point Assessment (EPA):** Where this qualification is taken as part of the Level 7 Senior Leader Apprenticeship, learners must review the specific requirements of the EPA assessment methods to ensure compliance. If Unit Assignments are submitted as part of the Portfolio of Evidence for EPA, the apprentice must ensure that work-product evidence is provided in Appendices/Annexes to demonstrate the skills and/or behaviours.

7 How this Qualification Links to Level 7 Senior Leader End-point Assessment

This qualification is designed to support apprentices during the on-programme part of the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1). It can be used to support progression, providing confidence in the apprentice’s competence and readiness to go through to End-point Assessment (EPA).

Centres may choose assessment through Portfolio and/or Unit Assignments, however apprentices may benefit from Portfolio assessment for the four units which map to the EPA Professional Discussion.

Centres must refer to the *ILM Level 7 Senior Leader End-point Assessment Pack* and *Recording Forms* for detailed guidance.

Mapping to the Standard

[Appendix B](#AppendixBMappingtoStandard) shows where each Knowledge, Skill, Behaviour (KSB) and Pass Grading Descriptor maps to this qualification.

The Units in [Section 8](#Section8Units) include reference to the Knowledge, Skills and Behaviours (KSBs).

The combined Assessment Criteria and Assessment Requirements (Sufficiency) provide full coverage of the KSBs and Pass Grading Descriptors.

Distinction Grading Descriptors are not covered; Apprentices and Centres should review the Distinction Grading Descriptors as part of preparation for EPA.

End-point Assessment

The [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1) has two assessment methods:

* Professional Discussion, underpinned by a Portfolio of Evidence.
* Strategic Business Proposal with three elements: Written, Presentation and Questioning.

Prior to Gateway, Centres should support apprentices by developing their skills for the Professional Discussion, Presentation and Questioning.

The Portfolio generated for this qualification **must be reviewed by the apprentice, employer and provider before submission at Gateway** to ensure it meets the requirements of EPA, including:

* Limits on the number of pieces of evidence.
* Duration restrictions for recordings.
* Only the KSBs and Grading Descriptors for the Professional Discussion must be evidenced.
* Evidence must by generated during the on-programme element of the apprenticeship.
* An Evidence Matrix mapping to the KSBs.
* If Unit Assignments are submitted as part of the Portfolio of Evidence for EPA, the apprentice must ensure that work-product evidence is provided in the Appendices/Annexes to demonstrate the skills and/or behaviours.

The Strategic Business Proposal title and summary is presented at Gateway as a 500-word Summary, and the Strategic Business Proposal in its entirety is completed **after Gateway**.

The Strategic Business Proposal in *Unit 704 Strategic Influencing & Negotiating* (AC2.2) does not need to be of a particular size or scale and would be part of a Senior Leader’s day-to-day role. It will be more than the 500-word Summary so should not be submitted at Gateway.

8 Units

This qualification is comprised of sevenUnits. A unit describes what is expected of a competent Senior Leader in their job role:

* **Learning Outcomes** describe the skills and knowledge that a learner will possess on completion of the qualification.
* **Assessment Criteria (AC)** specify what knowledge, skills and behaviours must be evidenced:
  + The code in brackets e.g. (K10) refers to the Knowledge, Skill or Behaviour (KSB) from the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1).
  + An AC may cover all or part of a KSB.
* **Depth** defines the minimum breadth or scope which a Centre should deliver in order to adequately prepare the learner.
  + The Depth includes examples of models and theories which Centres could cover within a topic. Relevant alternatives can be used.
  + Additional content can be delivered as long as it is relevant to the Assessment Criteria and the job role.
* **Assessment Requirements (Sufficiency)** detail how a learner **must** demonstrate their competence.
  + Numbers of theories/models provide evidence of the breadth of the subject.
* **Guided Learning Hours** reflect unitised delivery and assessment.
  + [Appendix A](#AppendixAGuidanceforDelivery) provides a suggested approach to delivery which combines Assessment Criteria into subjects.

The order of the units is only a suggestion; however, Centres can deliver in any order.

Suggestions for delivery and possible work-product evidence are included with each unit.

Unit 700 Building a High Performance Team

|  |  |
| --- | --- |
| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 182 |
| Unit Aim: | This unit will enable the learner to lead and influence people, drive continuous improvement, and develop a high performance team. |
| Assessment Method: | Portfolio or Unit Assignment |
| **Relationship to Apprenticeship Standard:** | This unit fully maps to the Team Working & Development KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K10, K18 * S4.2, S15, S16, S17, S18 * B2, B5 |

**Learning Outcome 1**

The learner will be able to develop a high performance team.

|  |  |  |
| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Explain how to utilise organisational and team dynamics.  (K10) | Use of team management skills such as team balance, to achieve strategic objectives through the team.  Models of collaborative working and their impact on team dynamics, such as:   * Covey's Partnership Paradigm.   The impact leadership style and approach can have on culture, both positively and negatively, including models such as:   * Situational leadership. * Goleman's model.   Motivational models, including reward culture, and their impact on teams. | The learner must explain utilisation of both organisational and team dynamics to build engagement and develop a high performance team.  The explanation must be supported by at least two relevant theories and models, including reference to leadership style and its impact. |
| **AC1.2**  Analyse how to develop high performance, agile and collaborative cultures.  (K10) | How to develop an agile and collaborative culture, using theories and models:   * Cultural mapping (e.g., Johnson's Culture Web). * Partnership working and synergy. * Trust and empowerment. * Practices. * Values. * Behaviours. * Dexterity. | The learner must analyse, referencing at least one theory/model of culture, how to develop high performance and agile and collaborative cultures. |
| **AC1.3**  Evaluate how and when to apply coaching and mentoring techniques.  (K18) | How and when to apply coaching and mentoring techniques.  Coaching and mentoring models, for example GROW, OSCAR, including active listening models and diagnostics to support team engagement. | The learner must evaluate how and when coaching and mentoring techniques would be applied, making reference to at least two models. |
| **AC1.4**  Optimise use of the skills of self and others through:   * Continuous Professional Development (CPD). * Workforce planning.   (S18, B5) | Use workforce planning to balance people and technical skills, using talent management, succession planning and workforce audit and design.  Understand the impact of workforce planning.  Pro-actively accessing professional networks and online/virtual CPD opportunities.  Use and encouragement of formal and informal development opportunities for self and wider team.  Use of knowledge cascade.  Supervision/appraisal/team development mapping, especially in relation to the CPD cycle, its application and its review. | The learner must demonstrate:   * How they pro-actively seek and encourage others to engage with continual development opportunities. * How they have optimised skills of self and others through effective workforce planning with reference to their impact on the balance of people and technical skills. * How they have optimised team engagement in order to develop high performance, agile and collaborative cultures. |
| **AC1.5**  Justify how they have used CPD and coaching and mentoring to build engagement and develop a high performance team.  (Pass Descriptor) | Characteristics of high performing teams.  Outcomes, including measuring of:   * Organisational/team dynamics. * Organisational culture. * Coaching & mentoring technique outcomes, e.g., WIN. * Optimise use of skills. * Succession planning. * Agility, e.g., The Three As. | The learner must justify how they have built engagement and developed a high performing team using:   * Continuous professional development (CPD) and coaching and mentoring. * For self and others.   The justification must refer to the elements of workforce planning, outcomes from the activities and measurement of same. |

**Learning Outcome 2**

The learner will be able to lead and influence people.

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| Assessment Criteria  The learner can… | Depth | Assessment Guidance (Sufficiency) |
| **AC2.1**  Evaluate how they have led and influenced people.  (S17) | Team leading skills - including an understanding of team maturity and the leader’s relationship to this.  Influencing skills, such as McKinsey's Influencing model.  Own leadership strengths and development areas.  Theories of leadership, for example situational leadership models, cultural leadership models, adaptive leadership, and Continuum of Leadership Behaviour. | The learner must demonstrate and evaluate how they both lead and influence people.  This must be supported by reference to at least three relevant models. |
| **AC2.2**  Evaluate how they have built constructive relationships.  (S17) | Build constructive relationships across teams, including upwards and outwards management.  Matrix management explained in the context of own and associated organisations.  Theories of emotional intelligence and their impact on teams and individuals.  Team formation theory, for example Group Locomotion Theory. | The learner must demonstrate and evaluate their leadership practice in building constructive relationships using at least two recent incidents in their workplace including the use of matrix management where required. |
| **AC2.3**  Evaluate how they have used feedback to develop confident and trustful teams.  (S15) | Aspects of giving and receiving feedback:   * How feedback supports team development and formation of confident and trustful teams. * Feedback cycles. * Means of gathering feedback, for example appraisal, supervision and 360 degree feedback. * Skills analysis and role profiles to ensure relevance of feedback. * Team environments and how cultures impact on the effective giving and receiving of feedback. * Trust quotient. | The learner must demonstrate and evaluate how they have used feedback to develop confident and trustful teams, including:   * Instances of own practice in both giving and receiving feedback at all levels in the organisation. * Acting upon feedback – highlighting areas of good practice and where development is required. |
| **AC2.4**  Evaluatehow they have enabled teams to take risks and challenge where appropriate.  (S15) | Importance of a team being able to take risks and challenge where appropriate.  Impact and influence of organisation’s policy and culture.  Supporting creativity in the workplace, to develop innovation.  Right/left brain inventory.  Risk taking cultures with an understanding of industry context.  Importance of innovation in business survival strategies and models.  Cultures of innovation and improvement, for example Shein's Cultural model, and Charles Handy’s cultural iconography.  Whistleblowing and safeguarding.  Strategic impact and influence of cultures which support open communication and respect whistleblowing, including promoting the use of active listening. | The learner must, with reference to own organisation’s policy and culture, outline and evaluate how they have enabled their team to take both risks and challenge, where appropriate. |

**Learning Outcome 3**

The learner will be able to drive continuous improvement.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC3.1**  Justify how they have established the value of ideas and change initiatives to drive continuous improvement.  (S4.2) | Value of ideas and change initiatives in the context of continuous improvement.  High performing teams, including outcome-based assessment.  Supporting idea generation.  Models to support parallel thinking, for example Six Thinking Hats, and process alignment, for example process mapping.  Developing and/or supporting innovation frameworks, including risk management and financial planning models.  Strategic change initiatives and models, for example Kotter, McKinsey 7S, ADKAR and Lewin.  Continuous improvement theories, for example Kaizen, Six Sigma or Perpetual Beta models. | The learner must demonstrate and justify how they support the value of ideas and change initiatives to drive continuous improvement.  The justification must include how they have taken responsibility for driving continuous improvement. |
| **AC3.2**  Justifyhow they have enabled an open culture and high performing working environment which supports continuous improvement.  (S16) | Open cultures and high performing working environments to support continuous improvement.  Open cultures – how they are formed and shaped, and the impact of leadership styles.  Models, for example Johnson's Culture Web, Charles Handy’s cultural iconography, Schein, or Cooke’s inventory. | The learner must demonstrate and justify how they have enabled an open culture and high performing working environment, taking responsibility for continuous improvement.  The demonstration must be supported by reference to at least two relevant models or theories. |
| **AC3.3**  Justify how they have set goals and accountabilities that align with own accountability and values.  (S16, B2) | Aligning own accountability to well-defined values.  Limits of personal accountability.  Values-based models, for example 4-V, and Accountability Theory by Vance, Lowry and Eggett.  Theories of ethical leadership, for example Principle-Centred Leadership.  Set goals and accountabilities for teams and individuals in own area of responsibility.  Goal setting frameworks, theories and models.  Strategic planning processes and continuous improvement cycles.  Components of strategic accountability:   * Legitimacy. * Transparency. * Disclosure. * Redress.     Core organisational values:   * Integrity and ethics. * Respect. * Innovation. * Drive.   Organisational alignment. | The learner must assess and justify how they set goals and accountabilities for both teams and individuals, with reference to at least one model of goal setting, and one of strategic accountability, identifying areas of good practice and making recommendations for the future.  The learner must explain the alignment between own accountability and well-defined values in the workplace and assess their ability to balance these. |

Guidance for Delivery

Tutor-led time that blends theory with practice would support this unit, with a broad exploration of high performance teams, culture, and leadership skills. A culture mapping exercise could encompass many of the themes within the unit, including cultures of high performance, risk taking and innovation, continuous improvement, and leadership and its impact. A workforce planning activity may also be of benefit.

Additional activities include reading, diagnostic tests, and modelling activities, as well as personal reflection on own practice and accountability.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Partnership agreements and outcome monitoring.
* Records of coaching and mentoring including diagnostics.
* Workforce planning documents and frameworks.
* CPD planning and recording.
* Records of appraisal and/or 360 degree assessment cycles.
* Outcome based evidence.
* Risk assessment and risk management records.
* Financial planning and control records.
* Organisational structure charts/maps.

Unit 701 Strategic Leadership

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| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 55 |
| Unit Aim: | This unit will enable the learner to set strategic direction in response to changing markets and stakeholder requirements within the context of different organisational structures, and outline the factors determining the ability to work with a diverse range of stakeholders. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Research KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K3, K14, K16 * S2, S19 |

**Learning Outcome 1**

The learner will be able to understand and work with a wide range of stakeholders and organisational structures.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Describehow to work within and across company boards and organisational structures.  (K14) | Organisational structures, such as:   * Hierarchical/vertical. * Matrix. * Centralised and De-centralised. * Team-based.   Components of a structure:   * Purpose/function and scope. * Stakeholders. * Organisational requirements.   Company boards. | The learner must describe three examples of how to effectively interact with organisational structures.  The learner must describe for each structure:   * Purpose/function and scope. * Stakeholders. * Organisational requirements. * Company board or executive structure. |
| **AC1.2**  Evaluate internal and external factors that impact working within leadership structures.  (K16) | Aspects required to deliver effectiveness within leadership structures in respect of the sustainability agenda.  Internal actions:   * Strategic direction. * Informed decisions. * People empowerment. * Learning and innovation. * Management incentives.   External actions:   * Markets and cross-sector partnerships. * Sustainable products and services. * Sustainability awareness. * Context transformation. * Stakeholder transparency. | The learner must evaluate the impact of at least three internal and three external factors when working within leadership structures, in terms of:   * The markets the organisation operates in. * Roles and responsibilities. * Sustainability agenda. * Leadership styles and application. |
| **AC1.3**  Critique the impact of their leadership upon stakeholders.  (S19) | Types of leadership structure specifically highlighting the challenges of managing relationships across a wide and diverse group of stakeholders.  Concepts of leadership styles and their impact on stakeholders, such as:   * Authoritative. * Affiliative. * Democratic. * Coaching. * Pacesetting. * Coercive. | The learner must explain at least three different leadership styles and subsequently critique the impact that their own leadership style has had upon a range of diverse stakeholders. |
| **AC1.4**  Evaluate how a strategic business proposal takes account of stakeholder engagement.  (K14, K16, S19) | Optimising strategic business proposals:   * Importance of and key considerations impacting upon stakeholder engagement.   Elements that contribute to the effective management of a diverse range of stakeholders:   * Assign internal responsibility for stakeholder engagement action. * Identify all stakeholder groups. * Take account of leadership structures. * Consult with stakeholders. * Set the parameters of stakeholder involvement. * Communicate, negotiate, and manage conflict. * Ongoing measurement and reporting. | The learner must explain the importance of stakeholder engagement in relation to a strategic business proposal and evaluate at least four of the elements that contribute to the effective management of a diverse range of stakeholders.  (The learner does not have to produce a strategic business proposal for this AC.) |

**Learning Outcome 2**

The learner will be able to set strategic direction in response to changing markets and stakeholder requirements.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Critically evaluate the components that support developing and setting direction of new market strategies.  (K3) | The benefits of horizon scanning, competitor analysis and general trend analysis in setting direction relating to new market strategies.  Key components of developing and subsequently monitoring a new market strategy and the methods utilised for evaluation:   * Target market. * Customer profile. * Demographics. * Market analysis.   Data analysis to track trends.  Models for analysis, such as:   * SWOT * PESTEL * Value Chain Analysis. * Porters Five Forces. * Four Corners Analysis. * Business Motivation Model. | The learner must explain the key components of developing and subsequently monitoring a new market strategy and the methods utilised for evaluation.  The learner is expected to critically evaluate the following aspects, referring to at least three models for analysis:   * Target market. * Customer profile. * Demographics. * Market analysis. |
| **AC2.2**  Set a high performance strategy and direction whilst managing relationships across a diverse range of stakeholders.  (S2) | The key skills required to set high performance strategy/direction and to ensure support across a wide and diverse range of stakeholders:   * Goal setting. * Engagement strategies. * Performance planning and monitoring. * Deploying a high performance team. * Defining competitive advantage. * Defining strategic direction, and planning.   The qualities and actions of a leader setting a high performance strategy:   * Inspiring. * Empathising. * Resolving conflict. * Goal setting. * Consistent communication of vision and direction. * Developing and maintaining trust. | When setting a high performance strategy which focusses on improving efficiency, changing customer demands and trend analysis, the learner must demonstrate:   * An appreciation of the importance of the skills, qualities and actions of a leader setting high performance strategy. * Identification of, and appropriate action for potential obstacles. * Stakeholder management. |

Guidance for Delivery

Tutor-led content should support both theoretical learning, and exploration of own practice as a leader. This should include an understanding of own leadership style and practice, the organisational structure and its impact, and stakeholder identification and engagement. Approaches to new market strategies can be supported by high-level case studies, and the underlying knowledge of external market strategy. Concepts of high performance teams and direction setting could be explored through peer discussion such as action learning sets.

Additional activities include reading, diagnostic tests, research, and modelling. Diagnostic tests could include a leadership styles assessment. Time to complete an external market scan could also be included.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Organisational structure map/chart.
* Stakeholder map/analysis.
* Horizon scans/trend/competitive analysis.
* Market analysis.
* External market scan/review.

Unit 702 Strategic Change Management

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| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 89 |
| Unit Aim: | This unit will enable the learner to shape their organisation’s mission, culture, and values, collaborate with others, and develop strategies to drive change to improve the organisation’s sustainability, as well as establishing a creative and innovative environment. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Driving Change & Risk Management KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K1, K4, K7, K17 * S4.1, S5, S6 * B1 |

**Learning Outcome 1**

The learner will be able to shape organisational mission, culture and values, and champion projects.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Evaluate how to shape organisational mission, culture, and values.  (K1) | Definitions of vision and mission.  Culture identification, mapping and shaping models such as Culture Web, strategy formation, and cultural frameworks.  Organisational values, for example Schein’s model including espoused, artifact and underlying.  The role of the strategic manager in setting organisational values.  Effective governance models.  Non-profit models (for example advisory board, patron, co-operative, management team, policy board).  Corporate governance models (for example traditional, carver board, cortex board, competency board). | The learner must evaluate how to shape an organisation’s mission, culture, and values, referring to at least two appropriate theories or models. |
| **AC1.2**  Evaluate how they have acted as a sponsor or ambassador by championing organisational projects that transform services.  (S6) | Attributes of a project sponsor/ambassador:   * Definition of project sponsor and project ambassador. * Engagement strategies including concepts of ‘buy-in’. * Professional networking skills. * Championing projects. * Synergy.   The steps to transformational change.  Matrix management and cross organisational strategy.  Impact of sustainability and the UK Net Carbon Zero by 2050 target on strategy and services. | The learner mustdemonstrate and evaluate their impact as either a sponsor or ambassador when they have championed projects that transform services across organisational boundaries. |

**Learning Outcome 2**

The learner will be able to lead and drive change to improve organisational sustainability.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Analyse how they have led and driven change in their area of responsibility.  (K4, S4.1) | Change:   * The steps to transformational change, for example Kotter, Kubler-Ross change curve, Lewin’s Unfreeze-Refreeze model. * Personal attributes to impact change, such as Kouznes-Posner Practices of Exemplary Leadership. * Managing others through change programmes, including theories of Emotional Intelligence, such as Goleman’s model, and open communication. * Performance expectations and the importance of milestone setting and quick-win celebration. * Matrix management and cross organisational strategy. * Strategic change management models, for instance ADKAR, Kubler-Ross. * Theory of disruptive technologies and their impact, for instance impact of technology and innovative strategising; challenging traditional business methods and practices. * New ways of working, including infrastructure, processes, people and culture, and sustainability considerations. | The learner must analyse how they have led and driven change in their own area of responsibility, including identification of change drivers and disruptive forces and technologies.  They must include how they support new ways of working across:   * Infrastructure. * Processes. * People and culture. * Sustainability. |
| **AC2.2**  Justifyhow they havebuilt an innovative and creative environment and review their ability to work collaboratively.  (K4, S4.1, B1) | Creating an environment for innovation and creativity:   * Frameworks for creative working including the impact of culture on creativity, risk-taking and open communication of ideas. * Structures that impact on creativity, such as flat vs hierarchical. * Encouraging collaborative problem solving and thinking such as de Bono’s Six Thinking Hats, system review frameworks, cooperative thinking strategies.   Definition and components of collaborative working:   * Mediation and conflict resolution. * Reciprocity. * Engagement. * Behaviours and cultures which support collaboration.   Definitions of empowerment and delegation:   * Principles of knowledge-cascade to support downward delegating and empowerment. * Peer mentoring and support including knowledge sharing, collaborative problem solving. * Project monitoring, for instance outcome measuring, metrics, task duration, scope and budget expectations. | The learner must demonstrate how they have built an environment for innovation and creativity to improve the sustainability of the organisation.  They must carry out a review of how they work collaboratively to enable both empowerment and delegation. This must include demonstration of behaviours which support collaborative working, such as engagement strategies.  This must be supported by a justification of the learner's actions including how they have improved the sustainability of the organisation. |

**Learning Outcome 3**

The learner will be able to make decisions using Big Data and insight, and lead in a crisis situation.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC3.1**  Critically analyse, in the context of competitive strategies and entrepreneurialism, decision making and insight to implement and manage change.  (K7) | Competitive strategies:   * Building sustainable competitive strategies. * Elements of competitive strategy, for example Porter’s Model (Cost, Differentiation).   Decision making:   * Identifying change drivers, for example through Lewin’s Force-field analysis, PESTLE, McKinsey 7S model and internal evaluation outcomes. * Tools and strategies such as process mapping, brainstorming, mind mapping.   Big Data:   * Definition of Big Data. * Information literacy – identifying the need and understanding the use of the data. * Analytical approaches to Big Data such as:   + SAP (Systems, Applications, Processes).   + ERP (Enterprise Resource Planning).   Insight:   * Insightful decision making tools, for example market research and stakeholder analysis.   Critical thinking:   * Heuristics. * Optimal decision making vs best fit. * Bounded rationality. * Authenticity and validation of data.   Data Analysis:   * Qualitative vs Quantitative information. * Statistical modelling for example Game Theory.   Entrepreneurialism:   * Definition of entrepreneurialism. * Innovation and business survival planning. * Entrepreneurial mindset. * Costs of entrepreneurship. * Opportunity seeking vs competitive advantage. * Wealth creation and sustainability. | The learner must critically analyse approaches to effective decision making when implementing and managing change, referring to the use of:   * Big Data. * Insights.   in the context of competitive strategies and entrepreneurialism. |
| **AC3.2**  Justify how they have led in a crisis situation using risk management techniques.  (K17, S5) | Risk management:   * Definitions of risk management. * Risk management frameworks/ strategies:   + Identification.   + Measurement.   + Mitigation.   + Reporting.   + Monitoring.   + Effective risk governance. * Risk management bodies and sharing good practice.   Crisis management skills:   * Pre-crisis:   + Risk management strategies.   + Governance and safeguarding.   + Contingency planning.   + Business continuity. * Crisis:   + Response tactics.   + Control and mitigation. * Post-crisis:   + Review and business planning adaptability. | The learner must justify their use of risk management strategies and techniques, and how they enhance their leadership and response to a crisis. |

Guidance for Delivery

Tutor-led time should include change management theory and an exploration of own practice and theories of collaborative working. Critical thinking theory, and the concept of Big Data, should be introduced. An emphasis on exploring own practice would be of benefit, through models such as peer-discussion, action learning sets, and reflective circles. Vision, mission, and values should form part of the learning for this unit, both in terms of own organisation and theories that inform vision and mission setting.

Additional activities include reading, research, and exploration of own practice in relation to unit aim and outcomes.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Strategic documents, including governance modelling, future-planning, vision, mission, and values statements.
* Project outlines with relevance to role of sponsor or ambassador.
* Organisational structure charts/maps.
* Process and mind maps.
* Innovation frameworks.
* Risk assessment and risk management documents.
* Financial planning policies and documents.

Unit 703 Organisational Values & the Strategic Context

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| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 95 |
| Unit Aim: | This unit will enable a learner to implement a high performance strategy, shape communications strategy in their area of responsibility, challenge assumptions, define their responsibility for financial strategies, and develop a Corporate Social Responsibility programme. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Organisational Values KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K2, K6, K13, K19, K20 * S1, S7, S8, S10, S21 |

**Learning Outcome 1**

The learner will be able to challenge assumptions and explain their responsibility for financial strategies.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements  (Sufficiency) |
| **AC1.1**  Interpret ethics and value-based leadership in order to challenge assumptions.  (K6, S7, S10) | Theories of ethical leadership such as:  Steven Covey:   * Principle-centred leadership. * ‘Doing the right thing vs doing things right.’   Kraemer’s Value-based leadership model:   * Self-reflection. * Balanced perspective. * True self-confidence. * Genuine humility.   Value-frameworks:   * Sustainability. * Ethics. * Operational integrity. * Financial accountability. * Business continuity. * Stewardship.   Effective challenging strategies.  Resource management:   * Human resources. * Economic resources. * Natural resources. * Space resources. * Speculative resources. * Risk management.   Input-Processes-Output modelling.  Concepts of efficiency vs effectiveness. | The learner must interpret theories and principles of ethics and value-based leadership in order to challenge strategies, operations and financial assumptions, in terms of:   * Ethics. * Responsibility – own and organisational. * Sustainability. * Resource allocation. * Business continuity and/or risk management. |
| **AC1.2**  Explain how and in which context they have overseen development and monitoringof financial strategies, including resource management.  (S10) | Setting and extended application of Key Performance Indicators (KPI) in the context of budgeting.  Factors of financial strategies:   * Business continuity. * Sustainability. * Monitoring/extended application. * Governance. * Return on investment. * Exposure to risk. | The learner must explain how and in which context they have overseen development and monitoring of financial strategies, including setting organisational budgets based on KPIs, to maintain both sustainability and business continuity.  This must include reference to at least two factors.  The learner must also define their responsibility for resource allocation. |

**Learning Outcome 2**

The learner will be able to shape and manage the communications strategy in their area of responsibility.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Critically review the external social and political environment to inform a communication strategy.  (K13) | Models to map the external business environment such as:   * PESTLE * STEEPLE * SWOT * Competitor analysis. * Industry life cycle models.   Using the output to inform a communication strategy. | The learner must utilise at least one recognised model to critically review their organisation’s external social and political environment and justify how it could inform the communication strategy. |
| **AC2.2**  Justify how they have shaped and managed a communication strategy within their area of responsibility.  (K20, S21) | Communications strategy strands:   * Branding. * Stakeholder engagement strategies. * Thought leadership. * Social media policies including risk management. * Communications cycle. * Communicating vision and values. * Monitoring and review. * Communication channels:   + Internal.   + External. | The learner must summarise how the organisation’s communications strategy links to their area of responsibility, with reference to three key strands within that strategy.  They must demonstrate how they both shaped and managed a communications strategy within their area of responsibility and provide a justification for their approach. |
| **AC2.3**  Justify how they have used diplomacy with diverse groups of internal and external stakeholders.  (K13) | Stakeholder analysis:   * Internal stakeholders. * External stakeholders.   Stakeholder groups:   * Users. * Governance. * Influencers. * Providers.   Stakeholder mapping models such as Power vs Influence modelling.  Stakeholder engagement:   * Collaborative/partnership working models. * Goal setting. * Reporting and monitoring strategies. * Advocating and consulting.   Diplomacy types, for example:   * Cultural. * Economic. * Gunboat. * Digital. * Coercive. * Shuffle. | The learner must justify their use of diplomacy with at least two groups of stakeholders when managing the communication strategy. This must include both internal and external stakeholders. |

**Learning Outcome 3**

The learner will be able to implement a high performance strategy.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC3.1**  Critically analyse how they have implemented a high performance strategy and synthesised outcomes.  (K2, S1) | Business modelling.  The organisation and its structure:   * Fit-for-purpose structure, governance and accountability.   Policy:   * Development and review.   Global and horizon scanning:   * Forecasting. * Trend analysis. * Scenario planning.   Horizon modelling, such as Three Horizon Model or Risk Radar.  Performance planning cycles.  High performing cultures.  Growth strategies.  Sustainability.  Talent management.  Organisational effectiveness.  Organisational capability and design models e.g., McKinsey 7S, and elements:   * Departmentalisation. * Chain of command. * Span of control.   De/Centralisation.  Critical analysis and data management.  Conceptualisation - connecting concepts, placing strategies in context of the external environment. | The learner must critically analyse how they have implemented a high performance strategy which focuses on growth and/or sustainable outcomes to improve efficiency.  The analysis must incorporate at least three synthesised outcomes from modelling and horizon scanning.  The analysis must include reference to:   * Organisation structures. * Business modelling. * Diversity. * Global and horizon scanning perspectives. * Governance and accountability. * Technological and policy implications. |

**Learning Outcome 4**

The learner will be able to develop a Corporate Social Responsibility programme that meets governance and regulatory requirements.

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| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC4.1**  Articulate how they have developed a Corporate Social Responsibility programme.  (K19, S8) | Corporate Social Responsibility (CSR):   * Definition. * Models of philanthropy such as Carroll’s model. * Organisational inputs.   Goal setting.  Ethics.  Partnership working.  Benefits of CSR:   * Organisation. * Community. * Wider society.   Programme planning, monitoring and review.  Risk management:   * Partner risks. * Future scanning. * Reputation management.   Regulatory compliance.  Alignment to organisational strategy. | The learner must articulate how they have applied the approach and principles of Corporate Social Responsibility to a CSR programme, including reference to regulatory compliance. |
| **AC4.2**  Justify how they have ensured compliance to governance and regulations when developing a CSR programme.  (S8) | Governance models:   * Self-regulation/CSR model vs governance. * Transparency and ethical behaviours. * Board composition. * Ownership structure.   Regulatory frameworks:   * Loose vs tight control of CSR activities.   Regulatory considerations including relevant legislation:   * Equality and diversity frameworks and legislation. * Workplace legislation including working hours, maternity/paternity requirements. * Health and safety requirements. | The learner must justify how they have ensured the organisation’s compliance with both governance and regulations when developing a CSR programme. |

Guidance for Delivery

Tutor-led time should underpin the knowledge required to carry out an external business scan to support themes of horizon-scanning and business competitiveness. A thorough understanding of financial strategies required to set targets should be delivered, as well as concepts such as efficiency vs effectiveness and resource management. A stakeholder analysis should be supported in the learning. Theories of ethical leadership could be explored using appropriate theorists, group interaction/review and high-level case studies.

Additional activities could include carrying out an external business scan, stakeholder analysis, additional reading and financial modelling activities.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Organisational value framework.
* Input-process-output modelling.
* Key Performance Indicators and Balanced Scorecards.
* Corporate Social Responsibility policy and/or project outline.
* Financial modelling, monitoring and reviews.
* Communications strategy and policies.
* Organisational scan, such as McKinsey 7s.

Unit 704 Strategic Influencing & Negotiating

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| --- | --- |
| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 46 |
| Unit Aim: | This unit will enable the learner to communicate and translate organisational vision into operational strategies, and use influencing and negotiating strategies to enhance brand and reputation. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Communication KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K12, K15 * S13, S20 |

**Learning Outcome 1**

The learner will be able to use influencing and negotiating strategies to enhance brand and reputation.

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| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Explain influencing and negotiating strategies.  (K12) | How and when to deploy influencing and negotiation strategies.  Influencing and negotiating strategies:   * McKinsey’s Negotiating Strategy. * Persuasion Tools model – compromise and logic. * INSEAD Negotiation Dynamics model. * Emotional Intelligence theory. * Game theory. * Stakeholder engagement and management. * Matrix management to influence upwards and outwards. | The learner must give a detailed explanation of:   * At least one relevant influencing strategy. * At least one relevant negotiating strategy. * How and when to use them in both an upwards and outwards direction.   They must explain how these contribute to the building of the brand and enhance reputation management. |
| **AC1.2**  Evaluate the methods used to build an organisation’s brand and enhance reputation management.  (K15) | Aspects of brand and reputation management and the methods used to develop these areas:   * Brand equity – value, reputation. * Brand risk management – audit and analysis. * Brand positioning – recognition and loyalty. * Brand performance – growth, sustainability and safeguarding. * Strategic stakeholder management through networking and strategic partnerships – pro-active, developing and managing. * Build the brand and enhance reputation management, for example influencing marketing strategy. * Theories – academic and applied theories, for example Macroscopic Model of Influence, and Steven Covey’s Seven Habits of Highly Effective People. | The learner must, with the support of two or more recognised theories, analyse aspects of brand and reputation management and evaluate the methods used to develop both of these areas within the workplace. |
| **AC1.3**  Justify how their leadership has built reputation and developed effective collaboration.  (S20) | Factors required to build effective collaboration within own team and across the wider organisation:   * Matrix management. * Open communication. * Influencing and negotiating.   The use of advocacy skills:   * Clarity of thought. * Independence. * People focused. * Empowerment. * Accessible and accountable. * Diplomacy. * Confidentiality. * The three types of advocacy:   + Self.   + Individual (members of the team).   + System. | The learner must demonstrate and justify how they have led within their area of control/authority, negotiating and using advocacy skills to build reputation and effective collaboration.  This must include advocacy to a range of individuals and/or stakeholder groups, and show a breadth of influencing, including upwards and externally to the organisation.  The learner must include how they have used these skills in developing the strategic business proposal in AC2.2. |

**Learning Outcome 2**

The learner will be able to communicate and translate organisational vision into operational strategies.

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| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Determine the communications process and its impact on the audience.  (S13) | Translating organisational vision into operational strategies:   * How to develop KPIs/Balanced Scorecard. * Monitoring and reviewing. * Resource allocation.   Factors in determining the communications process; audience, format and means of delivery:   * Communication strategy models, for example Barnlund, or Schramm. * Creating messages to engage and inspire. * Communication - upwards, downwards, outwards. * Models such as Drucker, Covey.   Personal presence and ‘storytelling’ to ensure understanding and impact across an audience.  Personal Presence:   * Charisma. * Confidence. * Energy. * Inspiring. * Selecting a communications style and level of formality, for example choice and method of platform.   Storytelling:   * Authenticity of self. * Influencing - achieve a positive impact on others. * Trust quotient. * Understanding audiences and their communications preferences. | The learner must demonstrate personal presence and ‘storytelling' when translating vision into operational strategy with the support of at least one relevant communication theory, including:   * Chosen style and level of formality, and clarity of thought and message. * Communications preferences of the audience. * Level of audience understanding, and engagement. |
| **AC2.2**  Deliver and present a strategic business proposal.  (S13, Pass Grading Descriptor) | Define a Strategic Business Proposal.  Clarity of thinking in communicating vision, values, and mission.  Creating operational strategy frameworks.  Knowledge transfer throughout an organisation, and beyond.  Stakeholder engagement.  Content of a Strategic Business Proposal:   * An executive summary. * The scope of the strategic business proposal (including Key Performance Indicators). * Objectives. * The strategic business proposal (which may include Gantt charts, risk/issue/mitigation, responsibility assignment matrix (RACI matrix)). * Financial budgeting and resources. * Proposed implementation of the strategic business proposal including communications and stakeholder plans. * Analysis of options identified in the strategic business proposal. * Recommendations and conclusions. * Evidence of senior leader or board agreement to the implementation of the strategic business proposal. * Brand and reputation management. | The learner must deliver and present a strategic business proposal which evidences:   * Clarity of thinking. * Translation of vision into operational strategy. * Scoping, planning, budgeting, and recommendations. * Impact and outcomes. * Understanding of audience needs and expectations.   The presentation must be planned and appropriate for at least two different audiences. The presentation does not have to be a PowerPoint. |

Guidance for Delivery

Tutor-led time includes theories of strategic influencing and negotiating supported by peer and self-review of practice. Stakeholder engagement, brand management and communications strategies could be explored through a blend of group/interactive learning, theory-led content and case-studies. Techniques for translating organisational vision into strategy can be supported through exploring own and other’s good practice and reviewing organisational tools available to carry out the translation. Learning to support the development and delivery of a strategic business proposal should also be included. Personal storytelling as a concept should be introduced; this could be further explored through peer-discussion.

Additional activities include reading, diagnostic tests, research and modelling, as well as time exploring organisation’s systems to support the translation of vision into strategy.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Stakeholder maps.
* Organisational structure maps/charts.
* Operational strategy policies.
* Key Performance Indicators and Balanced Scorecards.
* Operational frameworks.
* Strategic business proposal.

Unit 705 Strategic Data Analysis

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| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 47 |
| Unit Aim: | This unit will enable the learner to use research methodologies, financial strategies, and critical analysis to support decision making and deliver creative solutions. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Methodologies & Analysis KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K5, K8, K9 * S3, S11 * B3 |

**Learning Outcome 1**

The learner will be able to apply the process of ‘Systems Thinking’ to deliver creative solutions.

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| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Describe the concept of 'Systems Thinking' and how this has led to the development of creative and innovative solutions.  (K5) | The concept of 'Systems Thinking' and its application within the workplace to deliver clear and innovative solutions to areas of ambiguity and complexity.  Characteristics of Systems Thinking:   * Holistic thinking. * Considering stakeholders. * Importance of being a Systems Thinker.   Process/tools of Systems Thinking:   * RACI Matrix. * Iceberg metaphor (the Unseen). * Brainstorming. | The learner must describe the concept of 'Systems Thinking' and how and why it has been utilised to bring creative/innovative solutions within their workplace, including reference to at least two appropriate tools and/or characteristics. |
| **AC1.2**  Explain the concepts of research methods, data management and programme management, and how these have contributed to creative and innovative solutions.  (K5, B3) | The differences between research methodologies, data management and programme management and how each may contribute to the delivery of creative and innovative solutions to complex and ambiguous issues.  Research methods:   * Data collection, data handling and data analysis. * Primary and secondary data sources.   Data management:   * Combination of functions that ensure data in corporate systems is accurate, available and accessible, and meets the organisational needs. * Role of IT and data management teams, business users. * Business user engagement, for example policies governing its use.   Programme management:   * Delivering change. * Utilisation of benefits to satisfy the business case, for example capital and operational expenditure. * Shaping programmes, such as framing of projects. * Sponsor’s role in stakeholder engagement (programme vision, risk appetite). | The learner must explain the concepts and the differences between:   * Research methods. * Data management. * Programme management.   The learner must explain how each have been considered in the context of the delivery of creative and innovative solutions to complex and ambiguous issues. |

**Learning Outcome 2**

The learner will be able to develop financial strategies to support decision making.

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| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Critically evaluate their use of financial and non-financial information to support decision making within a governance framework.  (K8, K9, S11) | The difference between financial and non-financial information and the integration of each, set against the governance structure to support decision-making, including resource allocation.  Economic theory:   * The concept of value and risk. * The inter-relationship of value and price. * Concept of elasticity (of price, income, supply and cross elasticity).   Financial modelling:   * Sensitivity analysis. * Trend analysis/standard deviation. * Earnings before interest, tax, depreciation allowance (EBITDA). * Return on investment (ROI). * Discounted cash flow (DCF). * Net present value (NPV).   Non-financial information elements:   * Competitor analysis. * Dynamic market changes. * Political atmosphere. * Changing customer needs and wants, volume drivers. * Quality. * Customer and employee satisfaction, corporate and social responsibility. * Risks and opportunities. * Sustainable approaches.   Balanced scorecards.  Regulatory business reporting by, for example, the International Corporate Governance Network, International Financial Reporting Standards (IFRS), Charity Commission, International Accounting Standards Board (IASB).  Procurement strategies (resource allocation). | The learner must critically evaluate their use of a range of financial and non-financial information in line with economic theory and financial modelling, in order to support strategic decision-making, including resource allocation.  The learner must include how decision making is in line with legal, governance and procurement requirements. |
| **AC2.2**  Justify how they have approached research which includes a process of critical analysis and the integration of complex information.  (S3, B3) | Consideration of a research methodology appropriate to the workplace:   * Research methods. * Data management. * Programme management.   Methods used to synthesise, integrate and communicate complex information, and how these can inform innovative and creative solutions:   * Cross correlation and derivative analysis. * Balanced scorecard. * Be concise. * Employ the use of storytelling. * Visually enticing. * Use of metaphors and analogies. * Continually asking "So what?" (5W model). * Using appropriate technology to support understanding, e.g., mind-maps, flow charts. | The learner must justify how they selected and used a research approach to produce creative solutions.  This justification must include how the research incorporated:   * Consideration of research methodologies. * Integrating complex information. * Critical analysis of research data and outcomes. * Synthesising outcomes. * Innovative and creative solutions for areas of ambiguity or complexity. |

Guidance for Delivery

Tutor-led time should support the concepts of systems thinking, research methodologies and data management, and give time for participants to share their own practice in doing so and explore systems to support effective data and programme management. Examples of financial and non-financial data should be provided, through high-level case studies and group input.

Additional activities include reading, research, and modelling.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Financial/non-financial information used to support data analysis.
* Financial modelling.
* Balanced Scorecards.
* Root cause analysis.

Unit 706 Strategic Workforce & Logistics Planning

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| --- | --- |
| Unit Level: | 7 |
| Guided Learning Hours (GLH): | 33 |
| Unit Aim: | This unit will enable the learner to drive a culture of resilience and support through their use of strategic workforce planning, and oversee procurement, supply chain and contract management. |
| Assessment Method: | Portfolio or Unit Assignment |
| Relationship to Apprenticeship Standard: | This unit fully maps to the Finance, Workforce, Planning & Procurement KSB grouping within the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1):   * K11 * S9, S12, S14 * B4 |

**Learning Outcome 1**

The learner will be able to drive a culture of resilience and support through strategic workforce planning.

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| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC1.1**  Analyse how the key workforce planning activities contribute to the optimisation of workforce skills.  (K11) | Strategic workforce planning activities and how they contribute to the optimisation of workforce skills for the benefit of the organisation:   * Wellbeing. * Talent management. * Learning organisations. * Group work and knowledge transfer. * Workforce design:   + Agility and flexible working.   + Succession planning.   + Valuing difference and championing diversity. | The learner must identify the strategic workforce planning activities, and then analyse how the key activities contribute to the optimisation of workforce skills for the benefit of the organisation, including:   * Talent management. * Learning organisations. * Group work. * Workforce design. * Succession planning. * Diversity and Inclusion. |
| **AC1.2**  Evaluate own effectiveness when workforce planning to create and drive a resilient and inclusive culture.  (S9, S14, B4) | Elements that support development of a culture which enhances new enterprise and opportunities:  Resilient culture:   * Agile - crisis management. * Flexible – adaptability. * Conflict management and wellbeing.   Inclusive culture:   * Diversity, including legislation. * Difference. * Wellbeing.   Valuing difference and championing diversity, aligned to vision and strategy.  Workforce skills. | The learner must evaluate their effectiveness when workforce planning, including:   * Creating an inclusive culture valuing difference and wellbeing. * Championing diversity. * How they have driven resilience in order to optimise new enterprise and opportunities for the benefit of the organisation. |

**Learning Outcome 2**

The learner will be able to oversee procurement, supply chain and contract management.

|  |  |  |
| --- | --- | --- |
| Assessment Criteria  The learner can… | Depth | Assessment Requirements (Sufficiency) |
| **AC2.1**  Justify their approach to overseeing procurement.  (S12) | Procurement process.  Procurement factors:   * Financing purchases. * Creating purchase orders. * Negotiating price. * Buying goods. * Direct procurement. * Indirect procurement. * Sustainable approaches.   The differences between procurement, supply chain management and contracts. | The learner must justify their approach to overseeing procurement, supported by reference to own practice. |
| **AC2.2**  Justify their approach to overseeing supply chain management.  (S12) | Supply chain management process.  Supply chain management factors:   * Developing standards of quality. * Inventory control. * Inventory management. * Sustainability, such as disposal of waste products (e.g., packaging).   Outcome of approach upon organisational effectiveness of supply chain management:   * Increase margins and annual revenue. * Improve organisational ability to compete. * Influence customer satisfaction. * Optimise rate of supply. * Reduce cost in several areas of the organisation. | The learner must justify their approach to overseeing supply chain management, supported by reference to own practice. |
| **AC2.3**  Justify their approach to overseeing contracts.  (S12) | Contract process.  Contract factors:   * Cost-benefit analysis or cost-utility analysis. * Undertake background checks. * Establish points of contact. * Establish the contract life cycle. * Agree on a review process. * Outline consequences of delay. * Consider Service Level Agreements. * Consider rights and remedy clauses. * Reflect, document and evaluate. * Sustainable approaches. | The learner must justify their approach to overseeing contracting, supported by reference to own practice. |

Guidance for Delivery

Tutor-led delivery to support workforce planning and design should include theoretical content combined with an exploration of good practice, through group interaction/discussion and/or high level case studies. How enterprising cultures are built should be explored, with an emphasis on own and other’s practice, including how diversity can best be encouraged and supported. The definitions of, and differences between, procurement, supply chain management and contracting should be delivered.

Additional activities include reading, research, and modelling. Organisation’s logistics systems may also be researched.

Suggested Evidence

Work product which could be used as evidence for this unit:

* Workforce planning documents.
* Policies on diversity/inclusive working.
* Procurement, supply chain management and contracting outcomes.

Appendix A Guidance for Delivery

The GLH and TQT are based on unitised delivery. More efficient delivery can be achieved with a subject-based approach such as suggested below.

| **Subject** | **700 Building a High Performance Team** | **701 Strategic Leadership** | **702 Strategic Change Management** | **703 Organisational Values & the Strategic Context** | **704 Strategic Influencing & Negotiating** | **705 Strategic Data Analysis** | **706 Strategic Workforce & Logistics Planning** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Culture, Vision, Ethics, Mission, Values** | | | | | | | |
| Culture | AC 1.2 |  | AC 1.1 |  |  |  | AC 1.2 |
| AC 1.5 |
| AC 2.4 |
| AC 3.2 |
| Ethics |  |  |  | AC 1.1 |  |  |  |
| AC 4.1 |
| Mission, vision & values | AC 3.3 | AC 2.2 | AC 1.1 |  | AC 2.1 |  | AC 1.2 |
| Risktaking & challenging | AC 2.4 |  |  | AC 1.1 |  |  |  |
| Inclusion & diversity |  |  |  |  |  |  | AC 1.2 |
| Resilience |  |  |  |  |  |  | AC 1.2 |
| Whistleblowing & safeguarding | AC 2.4 |  |  |  |  |  | AC 1.2 |
| Innovation & creativity | AC 2.4 | AC 1.2 | AC 2.2 |  |  | AC 2.2 | AC 1.2 |
| **Leadership Skills** | | | | | | | |
| Leadership | AC 1.1 | AC 1.1 |  |  |  |  |  |
| AC 1.2 |
| AC 2.1 | AC 1.3 |
| AC 2.2 |
| Goal setting/KPIs | AC 3.3 | AC 2.2 |  | AC 1.2 | AC 2.1 |  |  |
| Ethical/values-based leadership | AC 3.3 |  | AC 1.2 | AC 1.1 | AC 1.3 | AC 1.2 | AC 1.1 |
| AC 2.1 | AC 2.1 | AC 1.2 |
| Emotional intelligence | AC 2.2 | AC 2.2 | AC 2.1 |  | AC 1.1 |  |  |
| **People Skills - Teams, Conflict, Communication, Delegation** | | | | | | | |
| Workforce planning & design | AC 1.4 |  |  |  |  |  | AC 1.1 |
| Conflict management |  | AC 1.4 |  |  |  |  | AC 1.2 |
| AC 2.2 |
| Talent/performance management |  | AC 2.2 |  | AC 3.1 |  |  | AC 1.1 |
| AC 1.2 |
| Team formation models | AC 2.2 |  |  |  |  |  |  |
| Teams | AC 1.1 | AC 2.2 |  |  |  |  | AC 1.2 |
| AC 1.5 |
| AC 2.1 |
| AC 2.2 |
| AC 2.3 |
| AC 3.1 |
| AC 3.3 |
| Communication |  | AC 1.4 | AC 2.1 | AC 2.2 | AC 1.3 | AC 2.2 |  |
| AC 2.2 | AC 2.1 |
| AC 2.2 |
| Empowerment/delegation |  | AC 1.2 | AC 2.2 |  |  |  |  |
| Stakeholders |  | AC 1.1 |  | AC 2.3 | AC 1.1 | AC 1.2 |  |
| AC 1.2 | AC 1.2 |
| AC 1.3 | AC 2.2 |
| AC 1.4 |
| AC 2.2 |
| Motivation models & impact | AC 1.1 |  |  |  |  |  |  |
| Collaborative working/thinking | AC 1.1 |  | AC 1.2 |  | AC 1.3 |  |  |
| AC 1.2 | AC 2.2 |
| Partnership working |  | AC 1.2 | AC 2.2 | AC 4.1 |  |  |  |
| Coaching & mentoring | AC 1.3 |  |  |  |  |  |  |
| AC 1.5 |
| Developing self & others | AC 1.4 | AC 2.2 |  |  | AC 2.2 |  | AC 1.1 |
| AC 1.5 |
| AC 2.3 |
| **Decision & Change Cycle** | | | | | | | |
| Change | AC 3.1 |  | AC 2.1 |  |  | AC 1.2 |  |
| AC 3.2 | AC 3.1 |
| AC 3.3 |
| Decision making |  |  | AC 3.1 |  | AC 1.1 | AC 1.2 |  |
| Continuous improvement | AC 3.1 |  |  |  |  |  |  |
| AC 3.3 |
| Game theory |  |  |  |  | AC 1.1 |  |  |
| Transformational change | AC 3.1 |  | AC 1.2 |  |  |  |  |
| Conceptualisation |  |  |  | AC 3.1 |  |  |  |
| Idea generation inc. parallel thinking & innovation frameworks | AC 3.1 |  | AC 2.2 |  |  |  |  |
| Critical thinking/analysis |  |  | AC 3.1 | AC 3.1 |  |  |  |
| **Organisational Structure** | | | | | | | |
| Organisational structure | AC 2.2 | AC 1.1 | AC 2.2 |  |  |  |  |
| Matrix management | AC 2.2 |  | AC 1.2 | AC 2.2 | AC 1.1 | AC 2.1 |  |
| AC 2.1 | AC 1.3 | AC 2.2 |
| Governance & regulatory |  | AC 1.1 | AC 1.1 | AC 4.2 |  | AC 2.1 |  |
| **Organisational Strategy** | | | | | | | |
| Strategic business proposal |  | AC 1.4 |  |  | AC 2.2 |  |  |
| Operational strategy |  | AC 2.2 |  |  | AC 2.1 |  |  |
| Balanced scorecard |  |  |  |  | AC 2.1 | AC 2.1 |  |
| AC 2.2 |
| Organisational strategy |  | AC 1.1 |  | AC 3.1 | AC 2.2 |  |  |
| AC 4.1 |
| Brand/reputation/marketing |  |  |  | AC 2.2 | AC 1.2 |  |  |
| CSR |  |  |  | AC 4.1 |  |  |  |
| Efficiency vs effectiveness |  |  |  | AC 1.1 |  |  |  |
| AC 3.1 |
| High performance strategy |  | AC 2.2 |  | AC 3.1 |  |  |  |
| **Outcomes** | | | | | | | |
| Monitoring/review |  | AC 1.4 |  |  | AC 2.1 |  |  |
| Outcomes/monitoring | AC 3.1 | AC 1.4 | AC 2.2 |  | AC 2.1 |  |  |
| AC 3.2 |
| **Organisational Management** | | | | | | | |
| Systems thinking |  |  |  |  |  | AC 1.1 |  |
| Research skills |  | AC 2.1 | AC 3.1 |  |  | AC 1.2 |  |
| AC 2.2 |
| Finance management/ economic theory |  |  |  | AC 1.2 |  | AC 2.1 |  |
| Project/programme management |  |  | AC 1.2 | AC 4.1 |  | AC 1.2 |  |
| AC 2.2 |
| Risk management |  |  | AC 3.2 | AC 4.1 | AC 1.2 |  |  |
| Crisis management |  |  | AC 3.2 |  |  |  |  |
| **Business Planning/Diagnostics** | | | | | | | |
| Big Data/data management |  | AC 2.1 | AC 3.1 |  |  | AC 1.2 |  |
| AC 2.1 |
| AC 2.2 |
| Competitive/growth strategies |  | AC 2.1 | AC 3.1 | AC 3.1 |  |  |  |
| Sustainability |  | AC 1.2 |  |  |  |  |  |
| Logistics |  |  |  |  | AC 2.1 | AC 2.1 | AC 1.2 |
| Forecasting/horizon scanning |  | AC 2.1 | AC 2.1 | AC 3.1 |  |  |  |
| External scanning |  | AC 2.1 | AC 3.2 | AC 2.1 |  | AC 2.1 |  |
| Internal scan |  | AC 2.1 | AC 3.1 | AC 3.1 |  |  |  |
| Business modelling |  |  |  | AC 3.1 |  | AC 2.1 |  |
| Disruptive technology |  |  |  |  | AC 1.3 |  |  |
| Procurement, Supply Chain & Contract Management |  |  |  |  |  |  | AC2.1 |
| AC2.2 |
| AC2.3 |
| **Personal Skills** | | | | | | | |
| Influencing skills inc. trust quotients | AC 2.1 | AC 2.2 |  |  | AC 1.2 |  |  |
| Own accountability | AC 3.3 |  |  |  |  |  |  |
| Aligning values | AC 3.3 |  |  |  |  |  |  |
| Challenging |  |  |  | AC 1.1 |  |  |  |
| Project ambassador/sponsor |  |  | AC 1.2 |  |  | AC 1.2 |  |
| Storytelling & personal presence |  | AC 2.2 |  |  | AC 2.1 | AC 2.2 |  |
| Advocacy |  |  |  |  | AC 1.3 |  |  |

Appendix B Mapping Level 7 Senior Leader Apprenticeship to Qualification

Knowledge, Skills and Behaviours (KSBs) and Pass Grading Descriptors from the [Level 7 Senior Leader Apprenticeship (ST0480/AP03)](https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-leader-v1-1)

| **Assessment Plan KSB Grouping &**  **KSBs & Pass Grading Descriptors** | **ILM Unit**  **& Assessment Criteria** |
| --- | --- |
| **Team Working & Development** | **700 Building a High Performance Team** |
| K10 Organisational/team dynamics and how to build engagement and develop high performance, agile and collaborative cultures | AC1.1  AC1.2 |
| K18 Coaching and mentoring techniques. | AC1.3 |
| S18 Optimise skills of the workforce, balancing people and technical skills and encouraging continual development. | AC1.4 |
| B5 Seek continuous professional development opportunities for self and wider team. | AC1.4 |
| Justifies how they use and encourage continued professional development opportunities for themself and others, as well as coaching and mentoring techniques, to build engagement in their team and develop an agile and collaborative culture of high performance (K10, K18, S18, B5) | AC1.2  AC1.5 |
| S15 Give and receive feedback at all levels, building confidence and developing trust, and enable people to take risks and challenge where appropriate. | AC2.3  AC2.4 |
| S17 Lead and influence people, building constructive working relationships across teams, using matrix management where required. | AC2.1  AC2.2 |
| Evaluates how they have led and influenced people, building constructive and trustful teams confident to take risks when appropriate and able to respond to and provide constructive feedback and challenge (S15, S17) | AC2.1  AC2.2  AC2.3  AC2.4 |
| S4.2 Establish the value of ideas and change initiatives and driving continuous improvement. | AC3.1 |
| S16 Enable an open culture and high-performance working environment and set goals and accountabilities for teams and individuals in their area. | AC3.2  AC3.3 |
| B2 Take personal accountability aligned to clear values. | AC3.3 |
| Justifies how they have taken responsibility for driving continuous improvement through establishing an open and high-performing working environment with clear goals and accountabilities (S4.2, S16, B2) | AC3.1  AC3.2  AC3.3 |
| **Research** | **701 Strategic Leadership** |
| K3 New market strategies, changing customer demands and trend analysis. | AC2.1 |
| S2 Set strategic direction and gain support for it from key stakeholders. | AC2.2 |
| Creates a high-performance strategy, focussing on improving efficiency changing customer demands and trend analysis and which has support from a range of stakeholders. (K3, S2) | AC2.2 |
| K14 Working with board and other company leadership structures. | AC1.1  AC1.4 |
| K16 Working with corporate leadership structures, for example, the markets it operates in, roles and responsibilities, who its stakeholders are and what they require from the organisation and the sustainability agenda. | AC1.2  AC1.4 |
| S19 Manage relationships across multiple and diverse stakeholders. | AC1.3 AC1.4 |
| Evaluates how the strategic business proposal takes full account of the leadership structures within the organisation and of key stakeholders and manages relationships across stakeholders. (K14, K16, S19) | AC1.4 |
| **Driving Change & Risk Management** | **702 Strategic Change Management** |
| K1 How to shape organisational mission, culture and values. | AC1.1 |
| S6: Act as a Sponsor/Ambassador, championing projects and transformation of services across organisational boundaries, such as those impacted by sustainability and the UK Net Carbon Zero by 2050 target. | AC1.2 |
| Evaluates how they shape their organisation's mission, culture and values by championing projects as an ambassador that transform services across the organisation (K1, S6) | AC1.1  AC1.2 |
| K4 Innovation; the impact of disruptive technologies (mechanisms that challenge traditional business methods and practices); drivers of change and new ways of working across infrastructure, processes, people and culture and sustainability. | AC2.1  AC2.2 |
| S4.1 Lead change in their area of responsibility, create an environment for innovation and creativity. | AC2.1  AC2.2 |
| B1 Work collaboratively enabling empowerment and delegation | AC2.2 |
| Justifies how they have worked collaboratively in driving change and implementing new ways of working to improve the sustainability of the organisation and how they have established a creative and innovative environment (K4, S4.1, B1) | AC2.2 |
| K7 Competitive strategies and entrepreneurialism, approaches to effective decision making, and the use of big data and insight to implement and manage change. | AC3.1 |
| Critically analyses approaches to decision making and the use of big data when developing competitive strategies to implement and manage change (K7) | AC3.1 |
| K17 Crisis and risk management strategies. | AC3.2 |
| S5 Lead and respond in a crisis situation using risk management techniques. | AC3.2 |
| Justifies the risk management techniques they have used to lead and respond to a crisis situation (K17, S5) | AC3.2 |
| **Organisational Values** | **703 Organisational Values & the Strategic Context** |
| K6 Ethics and values-based leadership theories and principles. | AC1.1 |
| S7 Challenge strategies and operations in terms of ethics, responsibility, sustainability, resource allocation and business continuity/risk management. | AC1.1 |
| S10 Oversee development and monitoring of financial strategies and setting of organisational budgets based on Key Performance Indicators (KPIs), and challenge financial assumptions underpinning strategies. | AC1.1  AC1.2 |
| Interprets ethics and value-based leadership theories and principles in order to challenge strategies, operations and financial assumptions and defines their responsibility for resource allocation and overseeing development and monitoring of financial strategies based on KPIs that maintain sustainability and business continuity/risk management (K6, S7, S10) | AC1.1  AC1.2 |
| K13 The external social and political environment and use of diplomacy with diverse groups of internal and external stakeholders | AC2.1  AC2.3 |
| K20 The organisation’s developing communications strategy and its link to their area of responsibility. | AC2.2 |
| S21 Shape and manage the communications strategy for their area of responsibility. | AC2.2 |
| Summarises how the communications strategy links to their area of responsibility and justifies the approaches taken to shape and manage it, taking account of the external social and political environment and the diverse needs of internal and external stakeholders (K13, K20, S21) | AC2.1  AC2.2  AC2.3 |
| K2 Organisation structures; business modelling; diversity; global and horizon scanning perspectives; governance and accountability; technological and policy implications. | AC3.1 |
| S1 Use horizon scanning and conceptualisation to deliver high performance strategies focusing on growth/sustainable outcomes. | AC3.1 |
| Implements a high-performance strategy, focussing on growth and improving efficiency, synthesising outcomes from modelling and horizon scanning (K2, S1) | AC3.1 |
| K19 Approaches to developing a Corporate Social Responsibility programme. | AC4.1 |
| S8 Apply principles relating to Corporate Social Responsibility, Governance and Regulatory compliance. | AC4.1  AC4.2 |
| Applies the approaches and principles to developing a corporate social responsibility programme and justifies how they apply these principles to ensure the organisation’s compliance to governance and regulations (K19, S8) | AC4.2 |
| **Communication** | **704 Strategic Influencing & Negotiating** |
| K12 Influencing and negotiating strategies both upwards and outwards. | AC1.1 |
| K15 Brand and reputation management. | AC1.2 |
| S20 Lead within their area of control/authority, influencing both upwards and outwards, negotiating and using advocacy skills to build reputation and effective collaboration. | AC1.3 |
| Justifies how they use influencing and negotiating strategies to collaborate with stakeholders and build their organisation’s brand and reputation in developing the strategic business proposal (K12, K15, S20) | AC1.3 |
| S13 Use personal presence and “storytelling” to articulate and translate vision into operational strategies, demonstrating clarity in thinking | AC2.1  AC2.2 |
| Delivers a strategic business proposal and presentation that demonstrates a clear vision for the organisation and translates this into operational strategies (S13) | AC2.2 |
| **Methodologies & Analysis** | **705 Strategic Data Analysis** |
| K5 Systems thinking, knowledge/data management, research methodologies and programme management. | AC1.1  AC1.2 |
| S3 Undertake research, and critically analyse and integrate complex information. | AC2.2 |
| B3 Curious and innovative - exploring areas of ambiguity and complexity and finding creative solutions. | AC1.2  AC2.2 |
| Justifies how they selected and used an approach that is underpinned by research using a range of methodologies, critically analysing and synthesising the outcomes and producing creative solutions to areas of ambiguity or complexity. (K5, S3, B3) | AC2.2 |
| K8 Financial strategies, for example scenarios, modelling and identifying trends, application of economic theory to decision-making, and how to evaluate financial and non- financial information, such as the implications of sustainable approaches. | AC2.1 |
| K9 Financial governance and legal requirements, and procurement strategies. | AC2.1 |
| S11 Uses financial data to allocate resources. | AC2.1 |
| Applies economic theories and financial modelling to develop strategies and allocate resources in line with legal, governance and procurement requirements (K8, K9, S11) | AC2.1 |
| **Finance, Workforce, Planning & Procurement** | **706 Strategic Workforce & Logistics Planning** |
| K11 Approaches to strategic workforce planning, for example, talent management, learning organisations, group work, workforce design, succession planning, diversity and inclusion. | AC1.1 |
| S9 Drive a culture of resilience and support development of new enterprise and opportunities. | AC1.2 |
| S14 Create an inclusive culture, encouraging diversity and difference and promoting well-being. | AC1.2 |
| B4 Value difference and champion diversity. | AC1.2 |
| Analyses their approach to workforce planning, evaluating its effectiveness in developing a diverse, inclusive, resilient and valued workforce that optimises their skills to the benefit of the organisation (K11, S9, S14, B4) | AC1.2 |
| S12: Oversee procurement, supply chain management and contracts, such as consideration of sustainable approaches. | AC2.1  AC2.2  AC2.3 |
| Justifies their approach to overseeing procurement, supply chain management and contracts (S12) | AC2.1  AC2.2  AC2.3 |

Appendix C Unit Assignments

Assignment: 700 Building a High Performance Team

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| **Aim:** In relation to your current Senior Leader role and duties you will lead and influence people, drive continuous improvement, and develop a high performance team.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheets.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 4,500 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 30 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 30 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to develop a high performance team.**  You are asked to explain how to utilise organisational and team dynamics, in conjunction with an analysis of how high performance, agile and collaborative cultures are developed. This analysis should include the differences between these cultures and make reference to your leadership style and its impact, and appropriate theory. (AC1.1, AC1.2)  In addition, you should evaluate how and when to apply coaching and mentoring techniques, evidencing your understanding of appropriate models to support the coaching and mentoring processes. You should also justify how you have used coaching and mentoring to build engagement and develop a high performance team. (AC1.3, AC1.5)  You are then asked to demonstrate and justify how you have managed workforce planning and the Continuous Professional Development of yourself and others, including how you proactively seek CPD opportunities for all. (AC1.4, AC1.5) | **AC1.1**  Explain how to utilise organisational and team dynamics.  **AC1.2**  Analyse how to develop high performance, agile and collaborative cultures.  **AC1.3**  Evaluate how and when to apply coaching and mentoring techniques.  **AC1.4**  Optimise use of the skills of self and others through:   * Continuous Professional Development (CPD). * Workforce planning.   **AC1.5**  Justify their use of CPD and coaching and mentoring to build engagement and develop a high performance team. |
| **Learning Outcome 2**  **The learner will be able to lead and influence people.**  You are asked to evaluate your ability to:   * Lead and influence people. * Build constructive relationships * Use feedback to develop confident and trustful teams.   This evaluation should be supported by relevant models and workplace examples. (AC2.1, AC2.2, AC2.3)  You are then asked to evaluate how you have enabled teams to take risks and challenge. Include examples of both and evidence the appropriateness of the risk taking and challenging. (AC2.4) | **AC2.1**  Evaluate how they have led and influenced people.  **AC2.2**  Evaluate how they have built constructive relationships.  **AC2.3**  Evaluate how they have used feedback to develop confident and trustful teams.  **AC2.4**  Evaluate how they have enabled teams to take risks and challenge where appropriate. |
| **Learning Outcome 3**  **The learner will be able to drive continuous improvement.**  In the context of continuous improvement, you are asked to justify how you have supported the value of ideas and change initiatives, and how you enabled an open culture and high performing work environment. (AC3.1, AC3.2)  You should then justify how you align organisational values with own accountability, and its impact on how you set goals. (AC3.3) | **AC 3.1**  Justify how they have established the value of ideas and change initiatives to drive continuous improvement.  **AC3.2**  Justify how they have enabled an open culture and high performing working environment which supports continuous improvement.  **AC3.3**  Justify how they have set goals and accountabilities that align with own accountability and values. |

Assignment: 701 Strategic Leadership

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| **Aim:** In relation to your current Senior Leader role and duties you will set strategic direction in response to changing markets and stakeholder requirements within the context of different organisational structures, and outline the factors determining your ability to work with a diverse range of stakeholders.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 3,000 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 20 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 20 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to understand and work with a wide range of stakeholders and organisational structures.**  You are asked to describe examples of interactions with organisational structures taking into account components of the structures.  (AC1.1)  You are additionally asked to evaluate the impact of internal and external factors when working within leadership structures, in terms of markets of operations, roles and responsibilities, the sustainability agenda and leadership styles and application. (AC1.2)  You are asked to critique your leadership styles to evaluate the impact that these, and a strategic business proposal, have had upon the effective management and engagement of a diverse range of stakeholders. (AC1.3, AC1.4) | **AC1.1**  Describehow to work within and across company boards and organisational structures.  **AC1.2**  Evaluate internal and external factors that impact working within leadership structures.  **AC1.3**  Critique the impact of their leadership upon stakeholders.  **AC1.4**  Evaluate how a strategic business proposal takes account of stakeholder engagement. |
| **Learning Outcome 2**  **The learner will be able to set strategic direction in response to changing markets and stakeholder requirements.**  You are asked to critically evaluate the components that support the development and ongoing evaluation of a high performing new market strategy, to include, the target market, customer profile, demographics, trends and market analysis. (AC2.1)  Additionally, you are asked to evidence how you have set a high performance strategy and direction with due consideration of relationship management and engagement across a diverse range of stakeholders. (AC2.2) | **AC2.1**  Critically evaluate the components that support developing and setting direction of new market strategies.  **AC2.2**  Set a high performance strategy and direction whilst managing relationships across a diverse range of stakeholders. |

Assignment: 702 Strategic Change Management

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| **Aim:** In relation to your current Senior Leader role and duties you will shape your organisation’s mission, culture, and values, collaborate with others, and develop strategies to drive change to improve the organisation’s sustainability, as well as establishing a creative and innovative environment.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 5,000 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 35 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 35 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to shape organisational mission, culture and values, and champion projects.**  You are asked to evaluate how to shape an organisation’s mission, culture, and values, making reference to appropriate theories or models. (AC1.1)  You need to demonstrate and evaluate your impact as either a sponsor or ambassador when you have championed projects that transform services across organisational boundaries. (AC1.2) | **AC1.1**  Evaluate how to shape organisational mission, culture, and values.  **AC1.2**  Evaluate how they have acted as a sponsor or ambassador by championing organisational projects that transform services. |
| **Learning Outcome 2**  **The learner will be able to lead and drive change to improve organisational sustainability.**  You are asked to analyse how you have:   * Led and driven change. * Identified change drivers and disruptive forces and technologies. * Supported new ways of working across:   + Infrastructure.   + Processes.   + People and culture.   + Sustainability.   (AC2.1)  You need to demonstrate how you have built an environment for innovation and creativity to improve sustainability. (AC2.2)  You are asked to review how you have worked collaboratively to enable both empowerment and delegation.  This review should:   * Include demonstration of your behaviours which support collaborative working, such as engagement strategies. * Be supported by a justification of your actions including how you have improved the sustainability of the organisation.   (AC2.2) | **AC2.1**  Analyse how they have led and driven change in their area of responsibility.  **AC2.2**  Justify how they have built an innovative and creative environment and review their ability to work collaboratively. |
| **Learning Outcome 3**  **The learner will be able to make decisions using Big Data and insight, and lead in a crisis situation.**  You are asked to critically analyse effective decision making when implementing and managing change, making reference to use of:   * Big Data. * Insights.   in the context of competitive strategies and entrepreneurialism. (AC3.1)  You should justify your use of risk management strategies and techniques, and how they have enhanced your leadership and response to a crisis. (AC3.2) | **AC3.1**  Critically analyse, in the context of competitive strategies and entrepreneurialism, decision making and insight to implement change.  **AC3.2**  Justify how they have led in a crisis situation using risk management techniques. |

Assignment: 703 Organisational Values & the Strategic Context

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| **Aim:** In relation to your current Senior Leader role and duties you will implement a high performance strategy, shape the communications strategy in your area of responsibility, challenge assumptions, define your responsibility for financial strategies, and develop a Corporate Social Responsibility programme.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 3,500 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 20 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 20 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to challenge assumptions and explain their responsibility for financial strategies.**  You are asked to provide an interpretation of ethics and value-based leadership and how this can be used to challenge underlying assumptions, both your own and others. (AC1.1)  You need to explain how and in which context you have overseen the development and monitoring of financial strategies and set organisational budgets. (AC1.2) | **AC1.1**  Interpret ethics and value-based leadership in order to challenge assumptions.  **AC1.2**  Explain how and in which context they have overseen development and monitoring of financial strategies, including resource management. |
| **Learning Outcome 2**  **The learner will be able to shape and manager the communications strategy in their area of responsibility.**  You are asked to carry out a critical review of the external business environment, using a recognised model, and refer to this in the context of a communication strategy. (AC2.1)  You also need to justify how you have shaped and managed a communication strategy in your own area of responsibility. (AC2.2)  With reference to own practice, you need to justify your use of diplomacy with internal and external stakeholders. (AC2.3) | **AC2.1**  Critically review the external social and political environment to inform a communication strategy.  **AC2.2**  Justify how they have shaped and managed a communication strategy within their area of responsibility.  **AC2.3**  Justify how they have used diplomacy with diverse groups of internal and external stakeholders. |
| **Learning Outcome 3**  **The learner will be able to implement a high performance strategy.**  You are asked to, with reference to own practice, critically analyse how you have implemented a high performance strategy. The analysis should incorporate conceptualisation and synthesised outcomes from modelling and horizon scanning. (AC3.1) | **AC3.1**  Critically analyse how they have implemented a high performance strategy and synthesised outcomes. |
| **Learning Outcome 4**  **The learner will be able to develop a Corporate Social Responsibility programme that meets governance and regulatory requirements.**  In the context of a Corporate Social Responsibility programme, you need to articulate how you have:   * Developed it. (AC4.1) * Ensured its compliance to both governance and the regulatory environment. (AC4.2) | **AC4.1**  Articulate how they have developed a Corporate Social Responsibility programme.  **AC4.2**  Justify how they have ensured compliance to governance and regulations when developing a CSR programme. |

Assignment: 704 Strategic Influencing & Negotiation

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| **Aim:** In relation to your current Senior Leader role and duties you will communicate and translate organisational vision into operational strategies, and use influencing and negotiating strategies to enhance brand and reputation  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 3,000 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 20 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 20 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to use influencing and negotiating strategies to enhance brand and reputation.**  You are asked to explain your understanding of influencing and negotiating strategies as well as how and when to use them in both an upward and outward direction. (AC1.1)  Additionally, you are asked to explain how you have applied such strategies and developed collaboration to build the brand and to enhance reputation management. (AC1.2, AC1.3) | **AC1.1**  Explain influencing and negotiating strategies.  **AC1.2**  Evaluate the methods used to build an organisation’s brand and enhance reputation management.  **AC1.3**  Justify how their leadership has built reputation and developed effective collaboration. |
| **Learning Outcome 2**  **The learner will be able to communicate and translate organisational vision into operational strategies.**  You are asked to demonstrate personal presence and storytelling with consideration of communications style and preferences, taking into account the audience, when translating organisational vision into operational strategy. (AC2.1)  Additionally**,** you are asked to deliver a strategic business proposal and presentation within which you have considered and evidenced clarity of thought, translation of vision into strategy, scoping, impact upon others and audience needs. (AC2.2) | **AC2.1**  Determine the communications process and its impact on the audience.  **AC2.2**  Deliver and present a strategic business proposal. |

Assignment: 705 Strategic Data Analysis

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| **Aim:** In relation to your current Senior Leader role and duties you will use ‘Systems Thinking’ to deliver creative solutions together with developing financial strategies to support decision making, all of which employ the process of critical analysis.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required; scenarios are not accepted because they do not support demonstration of your skills.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 3,000 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 20 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 20 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to apply the process of ‘Systems Thinking’ to deliver creative solutions.**  You are asked to describe the concept of ‘Systems Thinking’ and how and why this has been used to support the development of creative solutions within the workplace. (AC1.1)  In addition, you need to explain the underlying processes and tools used when undertaking ‘Systems Thinking’ and how this supports the development of creative solutions bringing clarity to ambiguity and complexity. (AC1.2) | **AC1.1**  Describe the concept of 'Systems Thinking' and how this has led to the development of creative and innovative solutions.  **AC1.2**  Explain the concepts of research methods, data management and programme management, and how these have contributed to creative and innovative solutions. |
| **Learning Outcome 2**  **The learner will be able to develop financial strategies to support decision making.**  You are asked to critically evaluate your use of financial and non-financial information in the context of financial modelling and economic theory to support decision making within the context of a governance framework. (AC2.1)  Additionally, you need to justify how you have approached research which has included the integration of complex information and subsequently the process of critical analysis. (AC2.2) | **AC2.1**  Critically evaluate their use of financial and non-financial information to support decision making within a governance framework.  **AC2.2**  Justify how they have approached research which includes a process of critical analysis and the integration of complex information. |

Assignment: 706 Strategic Workforce & Logistics Planning

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| **Aim:** In relation to your current Senior Leader role and duties you will drive a culture of resilience and support through your use of strategic workforce planning, and oversee procurement, supply chain and contract management.  All Assessment Criteria **and** Assessment Requirements must be met and utilised to structure your assignment, supported by work-product evidence. (Refer to the Units or Results Sheet.)  Evidence of skills applied in real-work situations is required.  Typical word counts and timings are provided. Where assessment methods are combined the recommended word counts and timings should be adjusted proportionately:   * Written Assignments: word count 2,500 +/- 10%, plus relevant Appendices/Annexes. At Level 7 there is an expectation that you write concisely. * Presentations: must be recorded, limited to 20 minutes, and accompanied by slides and speaker notes. * Professional Discussions: must be recorded, limited to 20 minutes, and accompanied by a summary of timestamps of where criteria are met.   Find the explanations of verbs on the ILM website: [www.i-l-m.com/assessment-and-resources/assessment-guidance](https://www.i-l-m.com/assessment-and-resources/assessment-guidance) | |
| **Assignment Task** | **Assessment Criteria**  The learner can: |
| **Learning Outcome 1**  **The learner will be able to drive a culture of resilience and support through strategic workforce planning.**  You are asked to identify and analyse the key workforce planning activities such as talent management and succession planning, with reference to how they contribute to the optimisation of workforce skills. (AC1.1)  You need to then evaluate your own effectiveness in terms of how you have created a culture that is both resilient and inclusive. You should evidence your own impact upon it, and how you have driven such a culture to optimise new enterprise and opportunities. (AC1.2) | **AC1.1**  Analyse how the key workforce planning activities contribute to the optimisation of workforce skills.  **AC1.2**  Evaluate own effectiveness when workforce planning to create and drive a resilient and inclusive culture. |
| **Learning Outcome 2**  **The learner will be able to oversee procurement, supply chain and contract management.**  You are asked to justify your approach and own practice to each of the following:   * Overseeing procurement. * Managing your supply chain. * Overseeing contracts.   (AC2.1, AC2.2, AC2.3) | **AC2.1**  Justify their approach to overseeing procurement.  **AC2.2**  Justify their approach to overseeing supply chain management.  **AC2.3**  Justify their approach to overseeing contracts. |

Appendix D Portfolio Evidence Matrix

Add the location of evidence for each Assessment Criteria.

Evidence is only required for Units which are being assessed by a Portfolio.

| **Assessment Criteria** | **Evidence Location**  **e.g., file name & page/paragraph, timestamp** |
| --- | --- |
| **Unit 700 Build a High Performance Team** | |
| **Learning Outcome 1** The learner will be able to develop a high performance team. | |
| **AC1.1**  Explain how to utilise organisational and team dynamics. |  |
| **AC1.2**  Analyse how to develop high performance, agile and collaborative cultures. |  |
| **AC1.3**  Evaluate how and when to apply coaching and mentoring techniques. |  |
| **AC1.4**  Optimise use of the skills of self and others through:   * Continuous Professional Development (CPD). * Workforce planning. |  |
| **AC1.5**  Justify how they have used CPD and coaching and mentoring to build engagement and develop a high performance team. |  |
| **Learning Outcome 2** The learner will be able to lead and influence people. | |
| **AC2.1**  Evaluate how they have led and influenced people. |  |
| **AC2.2**  Evaluate how they have built constructive relationships. |  |
| **AC2.3**  Evaluate how they have used feedback to develop confident and trustful teams. |  |
| **AC2.4**  Evaluatehow they have enabled teams to take risks and challenge where appropriate. |  |
| **Learning Outcome 3** The learner will be able to drive continuous improvement. | |
| **AC3.1**  Justify how they have established the value of ideas and change initiatives which drive continuous improvement. |  |
| **AC3.2**  Justifyhow they have enabled an open culture and high performing working environment which supports continuous improvement. |  |
| **AC3.3**  Justify how they have set goals and accountabilities that align with own accountability and values. |  |
| **Unit 701 Strategic Leadership** | |
| **Learning Outcome 1** The learner will be able to understand and work with a wide range of stakeholders and organisational structures. | |
| **AC1.1**  Describehow to work within and across company boards and organisational structures. |  |
| **AC1.2**  Evaluate internal and external factors that impact working within leadership structures. |  |
| **AC1.3**  Critique the impact of their leadership upon stakeholders. |  |
| **AC1.4**  Evaluate how a strategic business proposal takes account of stakeholder engagement. |  |
| **Learning Outcome 2** The learner will be able to set strategic direction in response to changing markets and stakeholder requirements. | |
| **AC2.1**  Critically evaluate the components that support developing and setting direction of new market strategies. |  |
| **AC2.2**  Set a high performance strategy and direction whilst managing relationships across a diverse range of stakeholders. |  |
| **Unit 702 Strategic Change Management** | |
| **Learning Outcome 1** The learner will be able to shape organisational mission, culture and values, and champion projects. | |
| **AC1.1**  Evaluate how to shape organisational mission, culture, and values. |  |
| **AC1.2**  Evaluate how they have acted as a sponsor or ambassador by championing organisational projects that transform services. |  |
| **Learning Outcome 2** The learner will be able to lead and drive change to improve organisational sustainability. | |
| **AC2.1**  Analyse how they have led and driven change in their area of responsibility. |  |
| **AC2.2**  Justifyhow they havebuilt an innovative and creative environment and review their ability to work collaboratively. |  |
| **Learning Outcome 3** The learner will be able to make decisions using Big Data and insight, and lead in a crisis situation. | |
| **AC3.1**  Critically analyse, in the context of competitive strategies and entrepreneurialism, decision making and insight to implement and manage change. |  |
| **AC3.2**  Justify how they have led in a crisis situation using risk management techniques. |  |
| **Unit 703 Organisational Values & the Strategic Context** | |
| **Learning Outcome 1** The learner will be able to challenge assumptions and explain their responsibility for financial strategies. | |
| **AC1.1**  Interpret ethics and value-based leadership in order to challenge assumptions. |  |
| **AC1.2**  Explain how and in which context they have overseen development and monitoringof financial strategies, including resource management. |  |
| **Learning Outcome 2** The learner will be able to shape and manage the communications strategy in their area of responsibility. | |
| **AC2.1**  Critically review the external social and political environment to inform a communication strategy. |  |
| **AC2.2**  Justify how they have shaped and managed a communication strategy within their area of responsibility. |  |
| **AC2.3**  Justify how they have used diplomacy with diverse groups of internal and external stakeholders. |  |
| **Learning Outcome 3** The learner will be able to implement a high performance strategy. | |
| **AC3.1**  Critically analyse how they have implemented a high performance strategy, and synthesised outcomes. |  |
| **Learning Outcome 4** The learner will be able to develop a Corporate Social Responsibility programme that meets governance and regulatory requirements. | |
| **AC4.1**  Articulate how they have developed a Corporate Social Responsibility programme. |  |
| **AC4.2**  Justify how they have ensured compliance to governance and regulations when developing a CSR programme. |  |
| **Unit 704 Strategic Influencing & Negotiation** | |
| **Learning Outcome 1** The learner will be able to use influencing and negotiating strategies to enhance brand and reputation. | |
| **AC1.1**  Explain influencing and negotiating strategies. |  |
| **AC1.2**  Evaluate the methods used to build an organisation’s brand and enhance reputation management. |  |
| **AC1.3**  Justify how their leadership has built reputation and developed effective collaboration. |  |
| **Learning Outcome 2** The learner will be able to communicate and translate organisational vision into operational strategies. | |
| **AC2.1**  Determine the communications process and its impact on the audience. |  |
| **AC2.2**  Deliver and present a strategic business proposal. |  |
| **Unit 705 Strategic Data Analysis** | |
| **Learning Outcome 1** The learner will be able to apply the process of ‘Systems Thinking’ to deliver creative solutions. | |
| **AC1.1**  Describe the concept of 'Systems Thinking' and how this has led to the development of creative and innovative solutions. |  |
| **AC1.2**  Explain the concepts of research methods, data management and programme management, and how these have contributed to creative and innovative solutions. |  |
| **Learning Outcome 2** The learner will be able to develop financial strategies to support decision making. | |
| **AC2.1**  Critically evaluate their use of financial and non-financial information to support decision making within a governance framework. |  |
| **AC2.2**  Justify how they have approached research which includes a process of critical analysis and the integration of complex information. |  |
| **Unit 706 Strategic Workforce & Logistics Planning** | |
| **Learning Outcome 1** The learner will be able to drive a culture of resilience and support through strategic workforce planning. | |
| **AC1.1**  Analyse how the key workforce planning activities contribute to the optimisation of workforce skills. |  |
| **AC1.2**  Evaluate own effectiveness when workforce planning to create and drive a resilient and inclusive culture. |  |
| **Learning Outcome 2** The learner will be able to oversee procurement, supply chain and contract management. | |
| **AC2.1**  Justify their approach to overseeing procurement. |  |
| **AC2.2**  Justify their approach to overseeing supply chain management. |  |
| **AC2.3**  Justify their approach to overseeing contracts. |  |

Appendix E Results Sheets

Results Sheet: 700 Building a High Performance Team

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to develop a high performance team. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Explain how to utilise organisational and team dynamics. | The learner must explain utilisation of both organisational and team dynamics to build engagement and develop a high performance team.  The explanation must be supported by at least two relevant theories and models, including reference to leadership style and its impact. | Pass/Referral |
| **AC1.2**  Analyse how to develop high performance, agile and collaborative cultures. | The learner must analyse, referencing at least one theory/model of culture, how to develop high performance and agile and collaborative cultures. | Pass/Referral |
| **AC1.3**  Evaluate how and when to apply coaching and mentoring techniques. | The learner must evaluate how and when coaching and mentoring techniques would be applied, making reference to at least two models. | Pass/Referral |
| **AC1.4**  Optimise use of the skills of self and others through:   * Continuous Professional Development (CPD). * Workforce planning. | The learner must demonstrate:   * How they pro-actively seek and encourage others to engage with continual development opportunities. * How they have optimised skills of self and others through effective workforce planning with reference to their impact on the balance of people and technical skills. * How they have optimised team engagement in order to develop high performance, agile and collaborative cultures. | Pass/Referral |
| **AC1.5**  Justify how they have used CPD and coaching and mentoring to build engagement and develop a high performance team. | The learner must justify how they have built engagement and developed a high performing team using:   * Continuous professional development (CPD) and coaching and mentoring. * For self and others.   The justification must refer to the elements of workforce planning, outcomes from the activities and measurement of same. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to lead and influence people. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Evaluate how they have led and influenced people. | The learner must demonstrate and evaluate how they both lead and influence people.  This must be supported by reference to at least three relevant models. | Pass/Referral |
| **AC2.2**  Evaluate how they have built constructive relationships. | The learner must demonstrate and evaluate their leadership practice in building constructive relationships using at least two recent incidents in their workplace including the use of matrix management where required. | Pass/Referral |
| **AC2.3**  Evaluate how they have used feedback to develop confident and trustful teams. | The learner must demonstrate and evaluate how they have used feedback to develop confident and trustful teams, including:   * Instances of own practice in both giving and receiving feedback at all levels in the organisation. * Acting upon feedback – highlighting areas of good practice and where development is required. | Pass/Referral |
| **AC2.4**  Evaluatehow they have enabled teams to take risks and challenge where appropriate. | The learner must, with reference to own organisation’s policy and culture, outline and evaluate how they have enabled their team to take both risks and challenge, where appropriate. | Pass/Referral |

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| **Learning Outcome 3**  The learner will be able to drive continuous improvement. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC3.1**  Justify how they have established the value of ideas and change initiatives to drive continuous improvement. | The learner must demonstrate and justify how they support the value of ideas and change initiatives to drive continuous improvement.  The justification must include how they have taken responsibility for driving continuous improvement. | Pass/Referral |
| **AC3.2**  Justifyhow they have enabled an open culture and high performing working environment which supports continuous improvement. | The learner must demonstrate and justify how they have enabled an open culture and high performing working environment, taking responsibility for continuous improvement.  The demonstration must be supported by reference to at least two relevant models or theories. | Pass/Referral |
| **AC3.3**  Justify how they have set goals and accountabilities that align with own accountability and values. | The learner must assess and justify how they set goals and accountabilities for both teams and individuals, with reference to at least one model of goal setting, and one of strategic accountability, identifying areas of good practice and making recommendations for the future.  The learner must explain the alignment between own accountability and well-defined values in the workplace and assess their ability to balance these. | Pass/Referral |

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| **Unit Outcome (delete as applicable):** | **PASS / REFERRAL** | **Date of QA check:** |  | **Signature of QA:** |  |

Results Sheet: 701 Strategic Leadership

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to understand and work with a wide range of stakeholders and organisational structures. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Describehow to work within and across company boards and organisational structures. | The learner must describe three examples of how to effectively interact with organisational structures.  The learner must describe for each structure:   * Purpose/function and scope. * Stakeholders. * Organisational requirements. * Company board or executive structure. | Pass/Referral |
| **AC1.2**  Evaluate internal and external factors that impact working within leadership structures. | The learner must evaluate the impact of at least three internal and three external factors when working with leadership structures, in terms of:   * The markets the organisation operates in. * Roles and responsibilities. * Sustainability agenda. * Leadership style and application. | Pass/Referral |
| **AC1.3**  Critique the impact of their leadership upon stakeholders. | The learner must explain at least three leadership styles and subsequently critique the impact that their leadership style has had upon a range of diverse stakeholders. | Pass/Referral |
| **AC1.4**  Evaluate how a strategic business proposal takes account of stakeholder engagement. | The learner must explain the importance of stakeholder engagement in relation to a strategic business proposal and evaluate at least four of the elements that contribute to the effective management of a diverse range of stakeholders.  (The learner does not have to produce a strategic business proposal for this AC.) | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to set strategic direction in response to changing markets and stakeholder requirements. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Critically evaluate the components that support developing and setting direction of new market strategies. | The learner must explain the key components of developing and subsequently monitoring a new market strategy and the methods utilised for evaluation.  The learner is expected to critically evaluate the following aspects, referring to at least three models for analysis:   * Target market. * Customer profile. * Demographics. * Market analysis. | Pass/Referral |
| **AC2.2**  Set a high performance strategy and direction whilst managing relationships across a diverse range of stakeholders. | When setting a high performance strategy which focusses on improving efficiency, changing customer demands and trend analysis, the learner must demonstrate:   * An appreciation of the importance of the skills, qualities and actions of a leader setting high performance strategy. * Identification of, and appropriate action for potential obstacles. * Stakeholder management. | Pass/Referral |

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Results Sheet: 702 Strategic Change Management

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to shape organisational mission, culture and values, and champion projects. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Evaluate how to shape organisational mission, culture, and values. | The learner must evaluate how to shape an organisation’s mission, culture, and values, referring to at least two appropriate theories or models. | Pass/Referral |
| **AC1.2**  Evaluate how they have acted as a sponsor or ambassador by championing organisational projects that transform services. | The learner mustdemonstrate and evaluate their impact as either a sponsor or ambassador when they have championed projects that transform services across organisational boundaries. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to lead and drive change to improve organisational sustainability. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Analyse how they have led and driven change in their area of responsibility. | The learner must analyse how they have led and driven change in their own area of responsibility, including identification of change drivers and disruptive forces and technologies, and how they support new ways of working across:   * Infrastructure. * Processes. * People and culture. * Sustainability. | Pass/Referral |
| **AC2.2**  Justifyhow they havebuilt an innovative and creative environment and review their ability to work collaboratively. | The learner must demonstrate how they have built an environment for innovation and creativity to improve the sustainability of the organisation.  They must carry out a review of how they work collaboratively to enable both empowerment and delegation. This must include demonstration of behaviours which support collaborative working, such as engagement strategies.  This must be supported by a justification of the learner's actions including how they have improved the sustainability of the organisation. | Pass/Referral |

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| **Learning Outcome 3**  The learner will be able to make decisions using Big Data and insight, and lead in a crisis situation. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC3.1**  Critically analyse, in the context of competitive strategies and entrepreneurialism, decision making and insight to implement and manage change. | The learner must critically analyse approaches to effective decision making when implementing and managing change, referring to the use of:   * Big Data. * Insights.   in the context of competitive strategies and entrepreneurialism. | Pass/Referral |
| **AC3.2**  Justify how they have led in a crisis situation using risk management techniques. | The learner must justify their use of risk management strategies and techniques, and how they enhance their leadership and response to a crisis. | Pass/Referral |

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Results Sheet: 703 Organisational Values & the Strategic Context

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to challenge assumptions and explain their responsibility for financial strategies. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Interpret ethics and value-based leadership in order to challenge assumptions. | The learner must interpret theories and principles of ethics and value-based leadership in order to challenge strategies, operations and financial assumptions, in terms of:   * Ethics. * Responsibility – own and organisational. * Sustainability. * Resource allocation. * Business continuity and/or risk management. | Pass/Referral |
| **AC1.2**  Explain how and in which context they have overseen development and monitoringof financial strategies, including resource management. | The learner must explain how and in which context they have overseen development and monitoring of financial strategies, including setting organisational budgets based on KPIs, to maintain both sustainability and business continuity.  This must include reference to at least two factors.  The learner must also define their responsibility for resource allocation. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to shape and manage the communications strategy in their area of responsibility. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Critically review the external social and political environment to inform a communication strategy. | The learner must utilise at least one recognised model to critically review their organisation’s external social and political environment and justify how it could inform the communication strategy. | Pass/Referral |
| **AC2.2**  Justify how they have shaped and managed a communication strategy within their area of responsibility. | The learner must summarise how the organisation’s communications strategy links to their area of responsibility, with reference to three key strands within that strategy.  They must demonstrate how they both shaped and managed a communications strategy within their area of responsibility and provide a justification for their approach. | Pass/Referral |
| **AC2.3**  Justify how they have used diplomacy with diverse groups of internal and external stakeholders. | The learner must justify their use of diplomacy with at least two groups of stakeholders when managing the communication strategy. This must include both internal and external stakeholders. | Pass/Referral |

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| **Learning Outcome 3**  The learner will be able to implement a high performance strategy. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC3.1**  Critically analyse how they have implemented a high performance strategy and synthesised outcomes. | The learner must critically analyse how they have implemented a high performance strategy which focuses on growth and/or sustainable outcomes to improve efficiency.  The analysis must incorporate at least three synthesised outcomes from modelling and horizon scanning.  The analysis must include reference to:   * Organisation structures. * Business modelling. * Diversity. * Global and horizon scanning perspectives. * Governance and accountability. * Technological and policy implications. | Pass/Referral |

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| **Learning Outcome 4**  The learner will be able to develop a Corporate Social Responsibility programme that meets governance and regulatory requirements. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC4.1**  Articulate how they have developed a Corporate Social Responsibility programme. | The learner must articulate how they have applied the approach and principles of Corporate Social Responsibility to a CSR programme, including reference to regulatory compliance. | Pass/Referral |
| **AC4.2**  Justify how they have ensured compliance to governance and regulations when developing a CSR programme. | The learner must justify how they have ensured the organisation’s compliance with both governance and regulations when developing a CSR programme. | Pass/Referral |

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Results Sheet: 704 Strategic Influencing & Negotiation

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to use influencing and negotiating strategies to enhance brand and reputation. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Explain influencing and negotiating strategies. | The learner must give a detailed explanation of:   * At least one relevant influencing strategy. * At least one relevant negotiating strategy. * How and when to use them in both an upwards and outwards direction.   They must explain how these factors contribute to the building of the brand and enhance reputation management. | Pass/Referral |
| **AC1.2**  Evaluate the methods used to build an organisation’s brand and enhance reputation management. | The learner must, with the support of two or more recognised theories, analyse aspects of brand and reputation management and evaluate the methods used to develop both of these areas within the workplace. | Pass/Referral |
| **AC1.3**  Justify how their leadership has built reputation and developed effective collaboration. | The learner must demonstrate and justify how they have led within their area of control/authority, negotiating and using advocacy skills to build reputation and effective collaboration.  This must include advocacy to a range of individuals and/or stakeholder groups, and show a breadth of influencing, including upwards and externally to the organisation.  The learner must include how they have used these skills in developing the strategic business proposal in AC2.2. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to communicate and translate organisational vision into operational strategies. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Determine the communications process and its impact on the audience. | The learner must demonstrate personal presence and ‘storytelling' when translating vision into operational strategy with the support of at least one relevant communication theory, including:   * Chosen style and level of formality, and clarity of thought and message. * Communications preferences of the audience. * Level of audience understanding, and engagement. | Pass/Referral |
| **AC2.2**  Deliver and present a strategic business proposal. | The learner must deliver and present a strategic business proposal which evidences:   * Clarity of thinking. * Translation of vision into operational strategy. * Scoping, planning, budgeting and recommendations. * Impact and outcomes. * Understanding of audience needs and expectations.   The presentation must be planned and appropriate for at least two different audiences. The presentation does not have to be a PowerPoint. | Pass/Referral |

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Results Sheet: 705 Strategic Data Analysis

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Learning Outcome 1**  The learner will be able to apply the process of ‘Systems Thinking’ to deliver creative solutions. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Describe the concept of 'Systems Thinking' and how this has led to the development of creative and innovative solutions. | The learner must describe the concept of 'Systems Thinking' and how and why it has been utilised to bring creative/innovative solutions within their workplace, including reference to at least two appropriate tools and/or characteristics. | Pass/Referral |
| **AC1.2**  Explain the concepts of research methods, data management and programme management, and how these have contributed to creative and innovative solutions. | The learner must explain the concepts and the differences between:   * Research methods. * Data management. * Programme management.   The learner must explain how each have been considered in the context of the delivery of creative and innovative solutions to complex and ambiguous issues. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to develop financial strategies to support decision making. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Critically evaluate their use of financial and non-financial information to support decision making within a governance framework. | The learner must critically evaluate their use of a range of financial and non-financial information in line with economic theory and financial modelling, in order to support strategic decision-making, including resource allocation.  The learner must include how decision making is in line with legal, governance and procurement requirements. | Pass/Referral |
| **AC2.2**  Justify how they have approached research which includes a process of critical analysis and the integration of complex information. | The learner must justify how they selected and used a research approach to produce creative solutions.  This justification must include how the research incorporated:   * Consideration of research methodologies. * Integrating complex information. * Critical analysis of research data and outcomes. * Synthesising outcomes. * Innovative and creative solutions for areas of ambiguity or complexity. | Pass/Referral |

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| **Assessor’s comments (optional):** |  | | | | |
| **Assessor’s Decision (delete as applicable):** | **PASS / REFERRAL** | **Date:** |  | **Signature of Assessor:** |  |
| **Unit Outcome (delete as applicable):** | **PASS / REFERRAL** | **Date of QA check:** |  | **Signature of QA:** |  |

Results Sheet: 706 Strategic Workforce & Logistics Planning

Instructions for Assessment

Assessment must be conducted with reference to the Assessment Criteria (AC) **and** Assessment Requirement (Sufficiency).

Assessors will award a ‘Pass’ or ‘Referral’ for each AC.

**In order to Pass the unit, every Assessment Criteria must be demonstrated by meeting the Assessment Requirement (Sufficiency).**

Referral would occur if the learner **does not**:

* provide sufficient evidence where the AC asks for from more than one model/activity, for example.
* provide evidence that meets the demand of the verb. e.g., The verb is ‘evaluate,’ however only an explanation or description is provided.
* provide the breadth and depth required e.g., provides an aspect of a process but does not show breadth of knowledge/skill or show depth of understanding of the process.

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| **Centre Number:** |  | **Centre Name:** |  |
| **Learner Registration:** |  | **Learner Name:** |  |

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| **Learning Outcome 1**  The learner will be able to drive a culture of resilience and support through strategic workforce planning. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC1.1**  Analyse how the key workforce planning activities contribute to the optimisation of workforce skills. | The learner must identify the strategic workforce planning activities, and then analyse how the key activities contribute to the optimisation of workforce skills for the benefit of the organisation, including:   * Talent management. * Learning organisations. * Group work. * Workforce design. * Succession planning. * Diversity and Inclusion. | Pass/Referral |
| **AC1.2**  Evaluate own effectiveness when workforce planning to create and drive a resilient and inclusive culture. | The learner must evaluate their effectiveness when workforce planning:   * Creating an inclusive culture valuing difference and wellbeing. * Championing diversity. * How they have driven resilience in order to optimise new enterprise and opportunities for the benefit of the organisation. | Pass/Referral |

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| **Learning Outcome 2**  The learner will be able to oversee procurement, supply chain and contract management. | | |
| **Assessment Criteria** | **Assessment Requirement - Pass** | **Pass/Referral**  **& Assessor feedback** |
| **AC2.1**  Justify their approach to overseeing procurement. | The learner must justify their approach to overseeing procurement, supported by reference to own practice. | Pass/Referral |
| **AC2.2**  Justify their approach to overseeing supply chain management. | The learner must justify their approach to overseeing supply chain management, supported by reference to own practice. | Pass/Referral |
| **AC2.3**  Justify their approach to overseeing contracts. | The learner must justify their approach to overseeing contracting, supported by reference to own practice. | Pass/Referral |

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| **Assessor’s comments (optional):** |  | | | | |
| **Assessor’s Decision (delete as applicable):** | **PASS / REFERRAL** | **Date:** |  | **Signature of Assessor:** |  |
| **Unit Outcome (delete as applicable):** | **PASS / REFERRAL** | **Date of QA check:** |  | **Signature of QA:** |  |

Sources of General Information

The following documents contain essential information for Centres delivering City & Guilds/ILM qualifications. They should be referred to in conjunction with this qualification handbook.

* *City & Guilds/ILM Quality Assurance Standards*
* *Centre Approval Process*
* *City & Guilds/ILM Centre Document Library*

The ILM website contains useful information on such things as:

* Walled Garden: how to register and certificate learners online.
* Events: dates and information on the latest Centre events.

Linking to this document from web pages

We regularly update the name of documents on our website, therefore in order to prevent broken links we recommend that you link to a web page that the document resides upon, rather than linking to the document itself.

Useful Contacts

|  |  |
| --- | --- |
| ILM Customer Services  General enquiries  Events enquiries  International enquiries  Complaints and feedback | customer@i-l-m.com |
| ILM Regulation and Compliance  Reporting malpractice/maladministration  Reporting incidents of plagiarism  Lodging appeals | [**investigationandcompliance@cityandguilds.com**](mailto:investigationandcompliance@cityandguilds.com) |

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We believe that great leaders can come from anywhere. With the right support, anyone can grow and develop to make a real difference to their team and organisation. Which is why we help individuals from all levels to realise and apply their potential, so that the organisations they work for can reap the benefits.

ILM is a City & Guilds Group Business. Together, we set the standard for professional and technical education and corporate learning and development around the world, helping people and organisations to develop their skills for personal and economic growth.

City & Guilds Group

Our vision is for a world in which everyone has the skills and opportunities to succeed. We support over 4 million people each year to develop skills that help them into a job, develop on that job and to prepare for their next job. As a charity, we’re proud that everything we do is focused on achieving this purpose. Whether that’s through delivering work-based learning programmes that build competency, providing flexible pathways that support lifelong employability or through the City & Guilds Foundation funding initiatives that help remove barriers to work and learning.

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