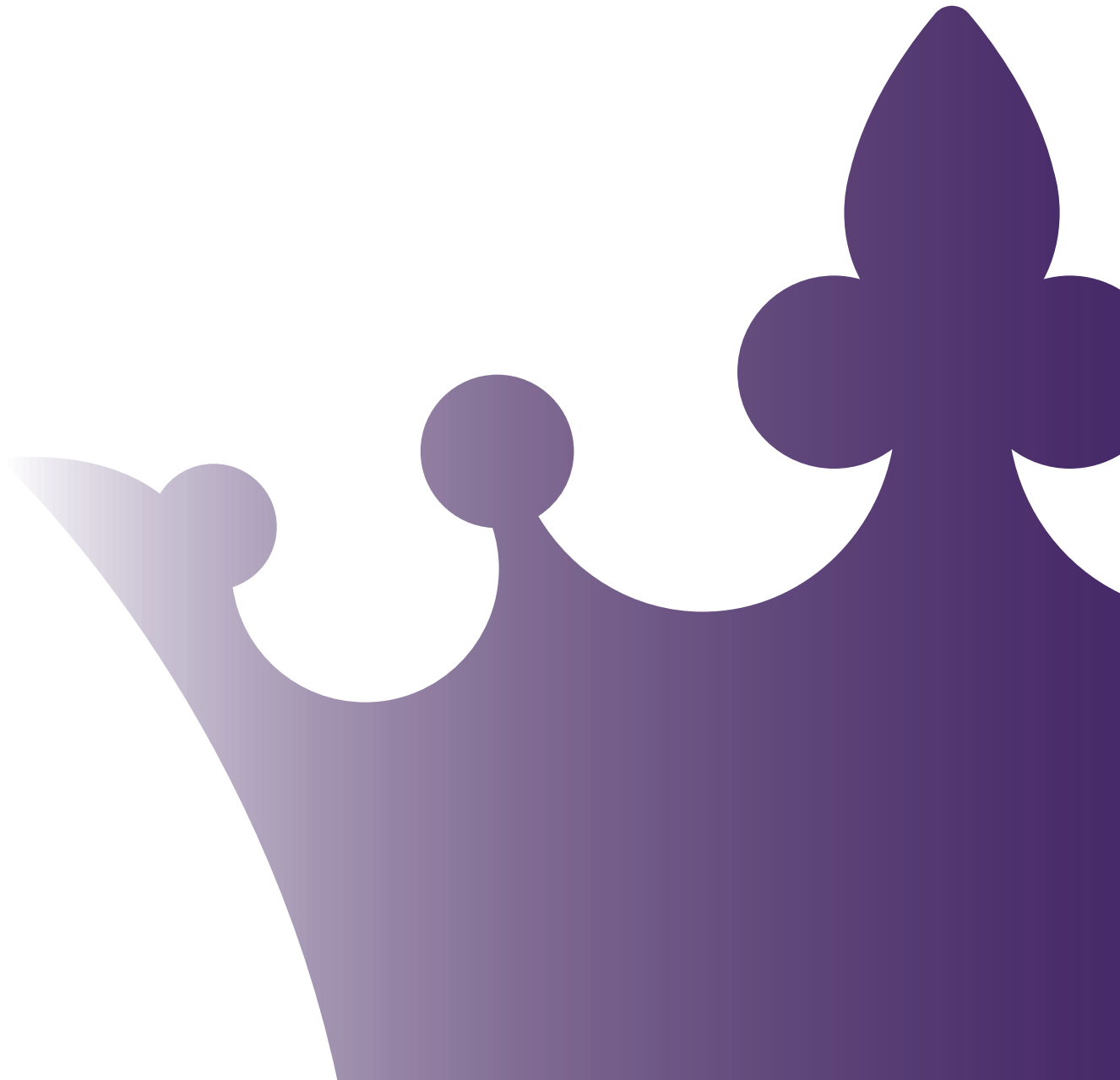




# **Qualification Handbook**

## **Level 2 Diploma in Business Administration**



# Qualification Handbook

## SFJ Awards Level 2 Diploma in Business Administration

Qualification Number: 601/6435/9

Version	Date of issue	Amendment(s)	Page
V2	28.07.17	Add Total Qualification Time (TQT)	9
		Update Section 2.9 Use of Languages	10
		Update Section 3 Centre Requirements (no change to requirements)	11
		Update Section 4 Assessment (no change to requirements)	12-25
		Add SFJ Awards copyright information	118
		Remove references to QCF	Various
V1	29.06.15	N/A	

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# 1 Introduction

## 1.1 About us

SFJ Awards is part of the Skills for Health and Justice Group. For over 10 years Skills for Health and Skills for Justice have been working with employers, Governments of the UK and agencies within the skills system, to better equip workforces with the right skills now and for the future.

During this time both Skills for Health and Skills for Justice have earned an enviable reputation for their knowledge of the sectors and their proactive approach to the development of skills and qualifications, along with an ability to deliver genuinely workable solutions for the employers they represent.

SFJ Awards is an awarding organisation that builds upon this reputation, and understands the specific challenges facing the Policing, Community Safety, Legal, Armed Forces and Health sectors, enabling us to quality assure learning outcomes that are suited to the needs of the sectors.

Customer satisfaction is the cornerstone of our organisation, and is delivered through an efficient, customer-led service, providing excellent value for money.

## 1.2 Customer Service Statement

Our Customer Service Statement is published on SFJ Awards website giving the minimum level of service that Centres can expect. The Statement will be reviewed annually and revised as necessary in response to customer feedback, changes in legislation, and guidance from the qualifications Regulators.

## 1.3 Centre Support

SFJ Awards works in partnership with its customers. For help or advice contact:

SFJ Awards  
Consult House  
Meadowcourt Business Park  
4 Hayland Street  
Sheffield  
S9 1BY

Tel: 0114 284 1970

E-mail: [info@sfjawards.com](mailto:info@sfjawards.com)

Website: [www.sfjawards.com](http://www.sfjawards.com)

# 2 The Qualification

## 2.1 Overall Objective for the Qualification

This handbook relates to the following qualification:

- SFJ Awards Level 2 Diploma in Business Administration

Administrators need a broad range of skills to work efficiently and help increase business productivity. The nature of administrative roles varies depending on the level and sector in which individuals are employed.

This qualification aims to provide a flexible structure with a wide range of optional units to allow its use in different environments. Administrative tasks may include producing business documents, contributing to the organisation of events, developing and delivering presentations, providing reception services, using and maintaining office equipment, providing administrative support for meetings, using a variety of software packages, analysing and presenting business documents and managing projects. The qualification's objective is to equip individuals with not only business-specific knowledge and skills required to carry out administrative roles, but also the softer-skills such as communication, team working and interpersonal skills.

## 2.2 Pre-entry Requirements

There are no pre-entry requirements for enrolling to complete this qualification.

## 2.3 Units and Rules of Combination

### Level 2 Diploma in Business Administration

This qualification is made up of 6 mandatory units and a range of optional units. To be awarded this qualification the learner must achieve a minimum of 45 credits, consisting of 21 mandatory and 24 optional credits.

To achieve the Level 2 Diploma in Business Administration learners must complete a minimum of 45 credits: 21 credits from Mandatory Group A and a minimum of 14 credits from Optional Group B must be completed.

A maximum of 10 credits can be taken from Optional Group C and a maximum of 6 credits from Optional Group D.

A minimum of 36 credits must be at or above Level 2.

<b>Mandatory Group A – 21 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Level</b>	<b>Credit Value</b>
H/506/1893	Communication in a business environment	2	3
A/506/1964	Understand employer organisations	2	4
J/506/1899	Principles of providing administrative services	2	4
T/506/1901	Principles of business document production and information management	2	3
L/506/1788	Manage personal performance and development	2	4
R/506/1789	Develop working relationships with colleagues	2	3

<b>Optional Group B – minimum 14 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Level</b>	<b>Credit Value</b>
A/506/1883	Administer the recruitment and selection process	2	3
D/506/1813	Handle mail	2	3
D/506/1875	Organise business travel or accommodation	2	4
H/506/1814	Provide reception services	2	3
H/506/1876	Provide administrative support for meetings	2	4
K/506/1815	Prepare text from notes using touch typing	2	4
L/506/1807	Manage diary systems	2	2
L/506/1810	Collate and report data	2	3
L/506/1869	Contribute to the organisation of an event	2	3
L/506/1905	Employee rights and responsibilities	2	2
M/506/1816	Prepare text from shorthand	2	6
M/506/1895	Buddy a colleague to develop their skills	2	3

Optional Group B – minimum 14 credits			
Unit Reference Number	Unit Title	Level	Credit Value
R/506/1811	Store and retrieve information	2	4
R/506/1887	Administer parking dispensations	2	3
R/506/1890	Administer finance	2	4
T/506/1817	Prepare text from recorded audio instruction	2	4
T/506/1865	Archive information	2	3
T/506/1879	Administer human resource records	2	3
Y/506/1809	Produce business documents	2	3
Y/506/1812	Produce minutes of meetings	2	3
A/506/1799	Meet and welcome visitors in a business environment	1	2
D/506/1794	Health and safety in a business environment	1	2
K/506/1796	Use a telephone and voicemail system	1	2
A/506/1916	Contribute to the development and implementation of an information system	3	6
F/506/1917	Monitor information systems	3	8
K/506/1913	Develop a presentation	3	3
M/506/1914	Deliver a presentation	3	3
M/506/1945	Analyse and present business data	3	6
Y/506/2295	Maintain and issue stationery and supplies	2	3
J/506/1868	Use and maintain office equipment	2	2

<b>Optional Group C – maximum 10 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Level</b>	<b>Credit Value</b>
M/502/4300	Using Email	2	3
F/502/4396	Bespoke Software	2	3
F/502/4625	Spreadsheet Software	2	4
J/502/4559	Data Management Software	2	3
M/502/4622	Presentation Software	2	4
R/502/4628	Word Processing Software	2	4
R/502/4631	Website Software	2	4
A/506/2130	Deliver customer service	2	5
F/506/1934	Participate in a project	3	3
F/601/8320	Processing customers' financial transactions	2	4
T/505/1238	Payroll Processing	2	5
R/506/2134	Process information about customers	2	3
Y/506/2149	Develop customer relationships	2	3

<b>Optional Group D – maximum 6 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Level</b>	<b>Credit Value</b>
A/506/1818	Understand the use of research in business	2	6
D/506/1939	Understand the legal context of business	3	6
D/502/9928	Principles of marketing theory	2	4
D/502/9931	Principles of digital marketing	2	5
K/503/8194	Principles of customer relationships	2	3
L/506/2083	Understand working in a customer service environment	1	3



Optional Group D – maximum 6 credits			
Unit Reference Number	Unit Title	Level	Credit Value
R/505/3515	Know how to publish, integrate and share using social media	2	5
F/505/6880	Exploring Social Media	2	2
L/505/3514	Understand the safe use of online and social media platforms	2	4
J/506/1806	Principles of equality and diversity in the workplace	2	2
R/506/2294	Principles of team leading	2	5

## 2.4 Total Qualification Time (TQT)

Total Qualification Time comprises of the following two elements.<sup>1</sup>

- 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.

Please note these are estimated hours. It is the responsibility of centres to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible, therefore, that the number of guided learning hours will vary from one centre to another according to learners' needs.

Guided learning hours consist of all occasions when a member of training centre staff is present to give specific guidance towards the learning aim of the programme. This definition includes lectures, tutorials, supervised study and assignments. It does not include hours where supervision or assistance is of a general nature and is not specific to learners' study.

The Total Qualification Time and Guided Learning Hours for this qualification are as follows:

Qualification Title	TQT	GLH
SFJ Awards Level 2 Diploma in Business Administration	450	229

<sup>1</sup> Total Qualification Time criteria, Ofqual September 2015  
<https://www.gov.uk/government/publications/total-qualification-time-criteria>

## **2.5 Age Restriction**

This qualification is available to learners aged 16 years and over.

## **2.6 Opportunities for Progression**

This qualification creates a number of opportunities for progression into business and/or management related qualifications and job roles.

## **2.7 Exemption**

No exemptions have been identified.

## **2.8 Credit Transfer**

Credits from identical units that have already been achieved by the learner may be transferred.

## **2.9 Use of Languages**

SFJ Awards business language is English and we provide assessment materials and qualification specifications that are expressed in English. Assessment specifications and assessment materials may be requested in Welsh or Irish and, where possible, SFJ Awards will try to fulfil such requests. SFJ Awards will provide assessment materials and qualification specifications that are expressed in Welsh or Irish and support the assessment of those learners, where the number of learners makes it economically viable for SFJ Awards to do so. More information is provided in the SFJ Awards' Use of Language Policy.

For learners seeking to take a qualification and be assessed in British Sign Language or Irish Sign Language, please refer to SFJ Awards' Reasonable Adjustments Policy. A learner may be assessed in British Sign Language or Irish Sign Language where it is permitted by SFJ Awards for the purpose of Reasonable Adjustment.

Policies are available on our website [www.sfjawards.com](http://www.sfjawards.com) or on request from SFJ Awards.

### 3 Centre Requirements

Centres must be approved by SFJ Awards and also have approval to deliver the qualifications they wish to offer. This is to ensure centres have the processes and resources in place to deliver the qualifications. Approved centres must adhere to the requirements detailed in the SFJ Awards Centre Handbook, which includes information for centres on assessment and internal quality assurance processes and procedures and is available in the centres' area of the SFJ Awards website <http://sfjawards.com/approved-centres>.

Centres are responsible for ensuring that their assessor and internal quality assurance staff:

- are occupationally competent and/or knowledgeable as appropriate to the assessor or IQA role they are carrying out
- have current experience of assessing/internal quality assuring as appropriate to the assessor or IQA role they are carrying out, and
- have access to appropriate training and support.

Information on the induction and continuing professional development of those carrying out assessment and internal quality assurance must be made available by centres to SFJ Awards through the external quality assurance process.

This qualification handbook should be used in conjunction with the SFJ Awards Centre Handbook, the SFJ Awards Assessment Policy and the SFJ Awards Quality Assurance (Internal and External) Policy. All policies are available on the website [www.sfjawards.com](http://www.sfjawards.com) or on request from SFJ Awards.

# 4 Assessment

## 4.1 Unit Assessment

Knowledge-only units in this qualification must be assessed using SFJ Awards assessment requirements.

Competence-knowledge based units and qualifications owned by Skills CFA must be assessed in line with the Skills CFA Assessment Strategy: Competence Units (S/NVQ)<sup>2</sup>.

Skills CFA Assessment Strategy: 2010 Sales Standards<sup>3</sup> applies to the following three units:

- D/502/9928 Principles of marketing theory
- D/502/9931 Principles of digital marketing
- K/503/8194 Principles of customer relationships

The Skills CFA assessment strategies are incorporated into this section and unit guidance at the end of individual units indicates where these apply.

## 4.2 SFJ Awards Assessment Requirements

### 4.2.1 Assessors

#### i) Occupational Competence

Due to the risk-critical nature of the work, particularly when assessing in the justice and health sectors, and the legal implications of the assessment process, assessors must understand the nature and context of the learners' work. This means that assessors must be occupationally competent. Each assessor must therefore be, according to current sector practice, competent in the functions covered by the units they are assessing. They will have gained their occupational competence by working within the sector relating to the units or qualification they are assessing.

Assessors must be able to demonstrate consistent application of the skills and the current supporting knowledge and understanding in the context of a recent role directly related to the qualification units they are assessing as a practitioner, trainer or manager.

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<sup>2</sup> Skills CFA Assessment Strategy: Competence Units (S/NVQ) Business Administration, Customer Service and Management and Leadership. February 2017

<sup>3</sup> Skills CFA Assessment Strategy: 2010 Sales Standards, December 2010 (updated January 2013)

## **ii) Occupational Knowledge**

Where assessors are assessing knowledge-based qualifications, they must be occupationally knowledgeable.

## **iii) Qualification Knowledge**

Assessors must be familiar with the qualification units they are assessing. They must be able to interpret and make judgements on current working practices and technologies within the area of work.

## **iv) Assessor Competence**

Assessors must be able to make valid, reliable and fair assessment decisions. To demonstrate their competence, assessors must be:

- qualified with a recognised assessor qualification, or
- working towards a recognised assessor qualification, or
- able to prove equivalent competence through training to appropriate national standards, for example, National Occupational Standard 9: Assess learner achievement<sup>4</sup> or Police Sector Standard for the Training of Assessors, Assessor Standard.

Approved centres will be required to provide SFJ Awards with current evidence of how each assessor meets these requirements, for example certificates of achievement or testimonials.

## **v) Continuing Professional Development**

Assessors must actively engage in continuous professional development activities to maintain:

- occupational competence and knowledge by keeping up-to-date with the changes taking place in the sector(s) for which they carry out assessments
- professional competence and knowledge as an assessor.

### **4.2.2 Internal Quality Assurers**

#### **i) Occupational Knowledge**

Internal quality assurers (IQAs) must be occupationally knowledgeable across the range of units for which they are responsible prior to commencing the role. Due to the risk-critical nature of the work, particularly in the justice and health sectors, and the legal implications of the assessment process, they must understand the nature and context of the assessors' work and that of their learners. This means that they must have worked closely with staff who carry out the functions covered by the qualifications, possibly by training or supervising

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<sup>4</sup> National Occupational Standards for Learning and Development, LLUK 2010

them, and have sufficient knowledge of these functions to be able to offer credible advice on the interpretation of the units.

## **ii) Qualification Knowledge**

IQAs must understand the content, structure and assessment requirements for the qualification(s) they are internal quality assuring.

Centres should provide IQAs with an induction to the qualifications that they are responsible for quality assuring. IQAs should also have access to ongoing training and updates on current issues relevant to these qualifications.

## **iii) Internal Quality Assurer Competence**

IQAs must occupy a position in the organisation that gives them the authority and resources to:

- coordinate the work of assessors
- provide authoritative advice
- call meetings as appropriate
- conduct pre-delivery internal quality assurance on centre assessment plans, for example, to ensure that any proposed simulations are fit for purpose
- visit and observe assessment practice
- review the assessment process by sampling assessment decisions
- ensure that assessment has been carried out by assessors who are occupationally competent, or for knowledge-based qualifications occupationally knowledgeable, in the area they are assessing
- lead internal standardisation activity
- resolve differences and conflicts on assessment decisions.

To demonstrate their competence, IQAs must be:

- qualified with a recognised internal quality assurance qualification, or
- working towards a recognised internal quality assurance qualification, or
- able to prove equivalent competence through training to appropriate national standards, for example National Occupational Standard 11: Internally monitor and maintain the quality of assessment<sup>5</sup> or Police Sector Standard for the Training of Internal Verifiers, Internal Verifier Standard.

Approved centres will be required to provide SFJ Awards with current evidence of how each IQA meets these requirements, for example certificates of achievement or testimonials.

## **iv) Continuing Professional Development**

IQAs must actively engage in continuous professional development activities to maintain:

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<sup>5</sup> National Occupational Standards for Learning and Development, LLUK 2010

- occupational knowledge by keeping up-to-date with the changes taking place in the sector(s) for which they carry out assessments
- professional competence and knowledge as an IQA.

### **4.2.3 External Quality Assurers**

External quality assurers (EQAs) are appointed by SFJ Awards to approve centres and to monitor the assessment and internal quality assurance carried out by centres. SFJ Awards is responsible for ensuring that their external quality assurance team have:

- sufficient occupational knowledge
- current experience of external quality assurance
- access to appropriate training and support.

External quality assurance is carried out to ensure that there is compliance, validity, reliability and good practice in centres. EQAs must have appropriate occupational and verifying knowledge and expertise.

#### **i) External Quality Assurer Competence**

To demonstrate their competence, EQAs must be:

- qualified with a recognised external quality assurance qualification, or
- working towards a recognised external quality assurance qualification.

#### **ii) Continuing Professional Development**

EQAs must maintain their occupational and external quality assurance knowledge. They will attend training and development designed to keep them up-to-date, facilitate standardisation between staff and share good practice.

### **4.2.4 Expert Witnesses**

Expert witnesses, for example line managers and supervisors, can provide evidence that a learner has demonstrated competence in an activity. Their evidence contributes to performance evidence and has parity with assessor observation. Expert witnesses do not however perform the role of assessor.

#### **i) Occupational Competence**

Expert witnesses must, according to current sector practice, be competent in the functions covered by the units for which they are providing evidence.

They must be able to demonstrate consistent application of the skills and the current supporting knowledge and understanding in the context of a recent role directly related to the qualification unit that they are witnessing as a practitioner, trainer or manager.

## ii) Qualification Knowledge

Expert witnesses must be familiar with the qualification unit(s) and must be able to interpret current working practices and technologies within the area of work.

### 4.3 Skills CFA Assessment Strategy: Competence Units (S/NVQ)<sup>6</sup>

#### 4.3.1 Assessors

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

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

To be able to assess candidates, assessors must:

- be “occupationally competent”. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed;

AND ONE OF EITHER OF THE FOLLOWING

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period; AND have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

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

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<sup>6</sup> Skills CFA Assessment Strategy Competence units (S/NVQ): Business Administration, Customer Service, Management and Leadership. February 2017



### **4.3.2 Internal Quality Assurer (IQA)**

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs.

IQAs must:

- be “occupationally competent”. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA and should be supported by a qualified IQA throughout their training period; AND demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process;

### **4.3.3 External Quality Assurer (EQA)**

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

EQAs must:

- be “occupationally competent”. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs

holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA and should be supported by a qualified EQA throughout their training period; AND demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process

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

#### **4.3.4 Employer Direct Model**

The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their Awarding Organisation may choose between:

- Achieving the appropriate regulatory body approved unit qualifications for assessment;

OR

- Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by the Awarding Organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

In order to use the employer direct model:

- An organisation must:
  - have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

- seek guidance and approval from an awarding organisation to demonstrate that they have:

- appropriate processes in place to facilitate assessment, moderation or verification functions
  - carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.
- An Awarding Organisation must:
    - offer this model to employers only
    - supply information on the requirements for internal and external moderation/verification activities to assessment centres.

#### **4.4 Skills CFA Assessment Strategy: 2010 Sales Standards<sup>7</sup>**

This assessment strategy applies to the following units:

- D/502/9928 Principles of marketing theory
- D/502/9931 Principles of digital marketing
- K/503/8194 Principles of customer relationships

##### **4.4.1 Assessing Performance**

Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary.

Units which have been imported by the CFA in their Sales NVQs / SVQs and competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

##### **4.4.2 Simulation of NVQ / SVQ units**

If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).

Awarding organisations will provide guidance for centres on RWEs<sup>8</sup>. Awarding organisations will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

##### **4.4.3 Occupational Expertise to Assess Performance, and Moderate and Verify Assessments**

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

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<sup>7</sup> Skills CFA Assessment Strategy: 2010 Sales Standards, December 2010 (updated January 2013)

<sup>8</sup> See Appendix 1 for Realistic Working Environment Guidelines

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

OR

- b. A trainer, supervisor or manager, employed by an organisation, who must either:
  1. Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

2. Seek guidance and approval from an awarding organisation to demonstrate that the;
  - Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
  - Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model.
2. Assessors must be occupationally competent to make Sales assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process.
3. External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.
4. Awarding organisations will supply information on the requirements for internal and external moderation / verification activities to Sales assessment centres.
5. The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. The CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

#### **4.5 Assessing Competence**

The purpose of assessing competence is to make sure that an individual is competent to carry out the activities required in their work. Assessors gather and judge evidence during normal work activities to determine whether the learner demonstrates their competence against the standards in the qualification unit(s). Competence should be demonstrated at a level appropriate to the qualification. The skills required at the different qualification levels

are defined in Ofqual's level descriptors.<sup>9</sup> Further information on qualification levels is included in the SFJ Awards Assessment Policy.

Evidence must be:

- Valid
- Authentic
- Sufficient
- Current
- Reliable.

Assessment should be integrated into everyday work to make the most of opportunities that arise naturally within the workplace.

#### **4.6 Methods for Assessing Competence**

Qualifications may be assessed using any method, or combination of methods in Section 4.1, which clearly demonstrate that the learning outcomes and assessment criteria have been met.

Assessors need to be able to select the right assessment methods for the competences that are being assessed, without overburdening the learner or the assessment process, or interfering with everyday work activities. SFJ Awards expects assessors to use a combination of different assessment methods to make a decision about an individual's occupational competence. Further information on assessment methods is provided below and also in the SFJ Awards Assessment Policy.

##### **4.6.1 Observation**

SFJ Awards believes that direct observation in the workplace by an assessor or testimony from an expert witness is preferable as it allows for authenticated, valid and reliable evidence. Where learners demonstrate their competence in a real work situation, this must be done without the intervention from a tutor, supervisor or colleague.

However SFJ Awards recognises that alternative sources of evidence and assessment methods may have to be used where direct observation is not possible or practical.

##### **4.6.2 Testimony of witnesses and expert witnesses**

Witness testimonies are an accepted form of evidence by learners when compiling portfolios. Witness testimonies can be generated by peers, line managers and other individuals working closely with the learner. Witnesses are defined as being those people who are occupationally expert in their role.

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<sup>9</sup> Qualification and Component Levels: Requirements and Guidance for All Awarding Organisations and All Qualifications, Ofqual 2015, [www.gov.uk/government/publications/qualification-and-component-levels](http://www.gov.uk/government/publications/qualification-and-component-levels)

Testimony can also be provided by expert witnesses who are occupationally competent **and** familiar with the qualification unit(s). Assessors will not need to spend as long assessing expert witness testimony as they would a witness testimony from a non-expert. Therefore if expert witnesses are involved in the assessment strategy for a qualification a greater number of learners can be managed by a smaller number of assessors.

The assessor is however responsible for making the final judgement in terms of the learner meeting the evidence requirements for the qualification unit(s).

#### 4.6.3 Work outputs (product evidence)

Examples of work outputs include plans, reports, budgets, photographs, videos or notes of an event. Assessors can use work outputs in conjunction with other assessment methods, such as observation and discussion, to confirm competence and assure authenticity of the evidence presented.

#### 4.6.4 Professional discussion

Discussions allow the learner to describe and reflect on their performance and knowledge in relation to the standards. Assessors can use discussions to test the authenticity, validity and reliability of a learner's evidence. Written/audio records of discussions must be maintained.

#### 4.6.5 Questioning the learner

Questioning can be carried out orally or in written form and used to cover any gaps in assessment or corroborate other forms of evidence. Written/audio records of all questioning must be maintained.

#### 4.6.6 Simulations

Evidence may be produced through simulation solely in exceptional circumstances and should only form a small part of the evidence for the qualification. Simulation can only be applied to the following competence and sales units:

Unit	Level
D/506/1794 Health and safety in a business environment	1
K/506/1796 Use a telephone and voicemail system	1
A/506/1799 Meet and welcome visitors in a business environment	1
D/502/9928 Principles of marketing theory	2
D/502/9931 Principles of digital marketing	2
K/503/8194 Principles of customer relationships	2

Simulations can be used when:

- the employer or assessor consider that evidence in the workplace will not be demonstrated within a reasonable timeframe

- there are limited opportunities to demonstrate competence in the workplace against all the assessment criteria
- there are health and safety implications due to the high risk nature of the work activity
- the work activity is non-routine and assessment cannot easily be planned for
- assessment is required in more difficult circumstances than is likely to happen day to day
- where situations are not naturally or readily occurring, such as response to emergencies.

Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Skills CFA guidelines for using RWE can be found in Appendix A.

Simulations may take place either in a non-operational environment which is not the learner's workplace, for example a training centre, or in the workplace. Proposed simulations must be reviewed to ensure they are fit for purpose as part of the IQA's pre-delivery activity.

Simulations must follow the principles below:

1. The nature of the contingency and the physical environment for the simulation must be realistic
2. Learners should be given no indication as to exactly what contingencies they may come across in the simulation
3. The demands on the learner during the simulation should be no more or less than they would be in a real work situation
4. Simulations must be planned, developed and documented by the centre in a way that ensures the simulation correctly reflects what the specific qualification unit seeks to assess and all simulations should follow these documented plans
5. There should be a range of simulations to cover the same aspect of a unit and they should be rotated regularly.

#### **4.7 Assessment Planning**

Planning assessment allows a holistic approach to be taken, which focuses on assessment of the learner's work activity as a whole. This means that the assessment:

- reflects the skills requirements of the workplace
- saves time
- streamlines processes
- makes the most of naturally occurring evidence opportunities.

Planning assessment enables assessors to track learners' progress and incorporate feedback into the learning process; assessors can therefore be sure that learners have had sufficient opportunity to acquire the skills and knowledge to perform competently and

consistently to the standards before being assessed. The assessment is therefore a more efficient, cost effective process which minimises the burden on learners, assessors and employers.

## **4.8 Standardisation**

Internal and external standardisation is required to ensure the consistency of evidence, assessment decisions and qualifications awarded over time.

### **4.8.1 Internal standardisation**

IQAs should facilitate internal standardisation events for assessors to attend and participate, in order to review evidence used, make judgments, compare quality and come to a common understanding of what is sufficient.

### **4.8.2 External standardisation**

SFJ Awards will enable access to external standardisation opportunities for centres and EQAs over time. Further information on standardisation is available in the SFJ Awards Quality Assurance (Internal and External) Policy and the SFJ Awards Standardisation Policy.

## **4.9 Recognition of Prior Learning (RPL)**

'Recognition of prior learning (RPL) is the process of recognising previous formal, informal or experiential learning so that the learner avoids having to repeat learning/assessment within a new qualification. RPL is a broad concept and covers a range of possible approaches and outcomes to the recognition of prior learning (including credit transfer where an awarding organisation has decided to attribute credit to a qualification)<sup>10</sup>

The use of RPL encourages transferability of qualifications and/or units, which benefits both learners and employers. SFJ Awards supports the use of RPL and centres must work to the principles included in Section 6 Assessment and Quality Assurance of the SFJ Awards Centre Handbook and outlined in SFJ Awards Recognition of Prior Learning Policy.

## **4.10 Equality and Diversity**

Centres must comply with legislation and the requirements of the RQF relating to equality and diversity. There should be no barriers to achieving a qualification based on:

- Age
- Disability
- Gender
- Gender reassignment
- Marriage and civil partnerships
- Pregnancy and maternity

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<sup>10</sup> After the QCF: A New Qualifications Framework, Ofqual 2015  
<https://www.gov.uk/government/consultations/after-the-qcf-a-new-qualifications-framework>



- Race
- Religion and belief
- Sexual orientation

Reasonable adjustments are made to ensure that learners who are disabled are not disadvantaged in any way. Learners must declare their needs prior to the assessment and all necessary reasonable adjustment arrangements must have been approved by SFJ Awards and implemented before the time of their assessment.

Further information is available in the SFJ Awards Reasonable Adjustments and Special Considerations Policy and the SFJ Awards Equality of Opportunity Policy.

#### **4.11 Health and Safety**

SFJ Awards is committed to safeguarding and promoting the welfare of learners, employees and volunteers and expect everyone to share this commitment.

SFJ Awards fosters an open and supportive culture to encourage the safety and well-being of employees, learners and partner organisations to enable:

- learners to thrive and achieve
- employees, volunteers and visitors to feel secure
- everyone to feel assured that their welfare is a high priority.

Assessment of competence based qualifications in the justice sector can carry a high risk level due to the nature of some roles. Centres must therefore ensure that due regard is taken to assess and manage risk and have procedures in place to ensure that:

- qualifications can be delivered safely with risks to learners and those involved in the assessment process minimised as far as possible
- working environments meet relevant health and safety requirements.

# 5 Qualification Units

## Mandatory Units

Unit Title		Communication in a business environment	
Level		2	
Credit Value		3	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the requirements of written and verbal business communication	1.1	Explain why different communication methods are used in the business environment
		1.2	Describe the communication requirements of different audiences
		1.3	Explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications
		1.4	Explain the importance of using appropriate body language and tone of voice when communicating verbally
2	Be able to produce written business communications	2.1	Identify the nature, purpose, audience and use of the information to be communicated
		2.2	Use communication channels that are appropriate to the information to be communicated and the audience
		2.3	Present information in the format that meets the brief
		2.4	Adhere to agreed business communication conventions and degree of formality of expression when producing documents
		2.5	Produce business communications that are clear, accurate and correct
		2.6	Meet agreed deadlines in communicating with others
3	Be able to communicate verbally in business environments	3.1	Identify the nature, purpose, recipient/s and intended use of the information to be communicated
		3.2	Use language that is appropriate for the recipient's needs
		3.3	Use body language and tone of voice to reinforce messages

		3.4	Identify the meaning and implications of information that is communicated verbally
		3.5	Confirm that a recipient has understood correctly what has been communicated
		3.6	Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAA613 Understand how to communicate in a business environment</li> <li>• CFABAA614 Prepare to communicate in a business environment</li> <li>• CFABAA615 Communicate in a business environment</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Understand employer organisations	
Level		2	
Credit Value		4	
GLH		40	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand organisational structures	1.1	Explain the differences between the private sector, public sector and voluntary sector
		1.2	Explain the functions of different organisational structures
		1.3	Describe the features of different types of legal structures for organisations
2	Understand the organisational environment	2.1	Describe the internal and external influences on organisations
		2.2	Explain the use of different models of analysis in understanding the organisational environment
		2.3	Explain why change in the business environment is important
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAF174 Manage work in a business environment</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Principles of providing administrative services	
Level		2	
Credit Value		4	
GLH		25	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the organisation and administration of meetings	1.1	Describe the features of different types of meetings
		1.2	Outline the different ways of providing administrative support for meetings
		1.3	Explain the steps involved in organising meetings
2	Understand the organisation of travel and accommodation	2.1	Describe the features of different types of business travel and accommodation
		2.2	Explain the purpose of confirming instructions and requirements for business travel and accommodation
		2.3	Explain the purpose of keeping records of business travel and accommodation
3	Understand how to manage diary systems	3.1	Describe the features of hard copy and electronic diary systems
		3.2	Explain the purpose of using diary systems to plan and co-ordinate activities and resources
		3.3	Describe the types of information needed to manage a diary system
		3.4	Explain the importance of obtaining correct information when making diary entries
4	Understand how to use office equipment	4.1	Describe different types of office equipment
		4.2	Explain the uses of different types of office equipment
		4.3	Describe factors to be considered when selecting office equipment to complete tasks
		4.4	Describe how to keep waste to a minimum when using office equipment
5	Understand the use of mail services in a business context	5.1	Describe the types of mail services used in business organisations
		5.2	Explain the need for different types of mail services
		5.3	Explain the factors to be considered when selecting mail services

		5.4	Explain the factors to be taken into account when choosing postage methods
6	Understand customer service in a business environment	6.1	Describe different types of customers
		6.2	Describe the impact of their own behaviour on a customer
		6.3	Explain the impact of poor customer service
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAA231 Use office equipment</li> <li>• CFABAA322 Organise business travel or accommodation</li> <li>• CFABAA412 Plan and organise meetings</li> <li>• CFABAA431 Use a diary system</li> <li>• CFABAA612 Handle mail</li> <li>• CFABAC121 Deliver, monitor and evaluate customer service to internal and/or external customers</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Principles of business document production and information management	
Level		2	
Credit Value		3	
GLH		21	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to prepare business documents	1.1	Describe different types of business documents that may be produced and the format to be followed for each
		1.2	Explain the use of different types of information communication technology (ICT) for document production
		1.3	Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production
		1.4	Explain the importance of document version control and authorisation
		1.5	Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents
		1.6	Explain how to check the accuracy of business documents
2	Understand the distribution of business documents	2.1	Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents
		2.2	Describe different types of distribution channels
3	Understand how information is managed in business organisations	3.1	Describe the types of information found in business organisations
		3.2	Explain the need for safe storage and efficient retrieval of information
		3.3	Describe the features of different types of systems used for storage and retrieval of information
		3.4	Describe the legal requirements for storing business information

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAA211 Produce documents in a business environment</li> <li>• CFABAD111 Support the design and development of information systems</li> <li>• CFABAD121 Support the management and development of an information system</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>



Unit Title		Manage personal performance and development	
Level		2	
Credit Value		4	
GLH		18	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to manage personal performance	1.1	Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
		1.2	Agree criteria for measuring progress and achievement with line manager
		1.3	Complete tasks to agreed timescales and quality standards
		1.4	Report problems beyond their own level of competence and authority to the appropriate person
		1.5	Take action needed to resolve any problems with personal performance
2	Be able to manage their own time and workload	2.1	Plan and manage workloads and priorities using time management tools and techniques
		2.2	Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
		2.3	Explain the benefits of achieving an acceptable “work-life balance”
3	Be able to identify their own development needs	3.1	Identify organisational policies relating to personal development
		3.2	Explain the need to maintain a positive attitude to feedback on performance
		3.3	Explain the potential business benefits of personal development
		3.4	Identify their own preferred learning style(s)
		3.5	Identify their own development needs from analyses of the role, personal and team objectives
		3.6	Use feedback from others to identify their own development needs
		3.7	Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

4	Be able to fulfil a personal development plan	4.1	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
		4.2	Make use of formal development opportunities that are consistent with business needs
		4.3	Use informal learning opportunities that contribute to the achievement of personal development objectives
		4.4	Review progress against agreed objectives and amend plans accordingly
		4.5	Share lessons learned with others using agreed communication methods
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> <li>CFAM&amp;LAA1 Manage yourself</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Develop working relationships with colleagues	
Level		2	
Credit Value		3	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the principles of effective team working	1.1	Outline the benefits of effective team working
		1.2	Describe how to give feedback constructively
		1.3	Explain conflict management techniques that may be used to resolve team conflicts
		1.4	Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
		1.5	Explain the importance of warning colleagues of problems and changes that may affect them
2	Be able to maintain effective working relationships with colleagues	2.1	Recognise the contribution of colleagues to the achievement of team objectives
		2.2	Treat colleagues with respect, fairness and courtesy
		2.3	Fulfil agreements made with colleagues
		2.4	Provide support and constructive feedback to colleagues
3	Be able to collaborate with colleagues to resolve problems	3.1	Take others' viewpoints into account when making decisions
		3.2	Take ownership of problems within own level of authority
		3.3	Take action to minimise disruption to business activities within their own level of authority
		3.4	Resolve problems within their own level of authority and agreed contribution
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> <li>CFAM&amp;LDD1Develop and sustain productive working relationships with colleagues</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

## Optional Group B

Unit Title		Administer the recruitment and selection process	
Level		2	
Credit Value		3	
GLH		25	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the recruitment and selection process	1.1	Explain the different administrative requirements of internal and external recruitment
		1.2	Describe the uses of a job description and a person specification
		1.3	Explain the administrative requirements of different methods of selection
		1.4	Explain the requirements of different pre-employment checks to be carried out
		1.5	Explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process
		1.6	Explain the requirements of confidentiality, data protection and system security
2	Be able to administer the recruitment process	2.1	Check that the job or role details are correct and are in accordance with the brief
		2.2	Place job advertisements in the agreed media in accordance with the timescales
		2.3	Record applicant responses within the timescale
		2.4	Provide requested information to applicants in accordance with organisational policies and procedures
		2.5	Adhere to organisational policies and procedures, legal and ethical requirements
3	Be able to administer the selection process	3.1	Invite shortlisted applicants to participate in the selection process in accordance with organisational procedures
		3.2	Co-ordinate selection arrangements in accordance with the brief
		3.3	Carry out agreed pre-employment checks within the agreed timescale
		3.4	Inform applicants of the outcome of their application in accordance with organisational policies and procedures

		3.5	Keep selection records up-to-date
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• BAB152 Administer the recruitment and selection process</li> </ul>		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)		

Unit Title		Handle mail	
Level		2	
Credit Value		3	
GLH		15	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to deal with mail	1.1	Explain how to deal with “junk” mail
		1.2	Describe what to do in the event of problems arising when dealing with incoming or outgoing mail
		1.3	Describe how to operate a franking machine
		1.4	Explain how to prepare packages for distribution
		1.5	State organisational policies and procedures on mail handling, security and the use of courier services
		1.6	Explain the process for reporting suspicious or damaged items in accordance with organisational procedures
2	Be able to deal with incoming mail	2.1	Sort incoming mail in line with organisational procedures
		2.2	Distribute incoming mail and packages to the right people according to the agreed schedule
		2.3	Deal with incorrectly addressed and “junk” mail in accordance with organisational procedures
3	Be able to deal with outgoing mail	3.1	Organise the collection of outgoing mail and packages on time
		3.2	Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item
		3.3	Dispatch outgoing mail on time
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA612 Handle mail</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Organise business travel or accommodation	
Level		2	
Credit Value		4	
GLH		23	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the organisation of business travel or accommodation for others	1.1	Explain any budgetary or policy constraints relating to business travel or accommodation
		1.2	Describe financial arrangements relating to business travel or accommodation
		1.3	Explain how to make arrangements for visas and related foreign travel documentation
		1.4	Describe the procedures for obtaining or exchanging foreign currency
2	Be able to research business travel or accommodation options for others	2.1	Identify different suppliers that are capable of delivering the services required within budget
		2.2	Recommend travel or accommodation arrangements that best meet the requirements
		2.3	Recommend suppliers of travel or accommodation that best meet the requirements
3	Be able to make business travel or accommodation arrangements for others	3.1	Confirm the requirements for travel or accommodation
		3.2	Agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
		3.3	Prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately
		3.4	Obtain travel or accommodation documentation within the required timescale
		3.5	Confirm the acceptability of payments to be made within the limits of their own authority
		3.6	Keep up-to-date records of travel or accommodation arrangements and agreed commitments
		3.7	Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAA322 Organise business travel or accommodation</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>



Unit Title		Provide reception services	
Level		2	
Credit Value		3	
GLH		15	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand reception services	1.1	Explain the receptionist's role in representing an organisation
		1.2	Explain an organisation's structure and lines of communication
		1.3	Describe an organisation's standards of presentation
		1.4	Explain the health, safety and security implications of visitors to a building
		1.5	Explain how to deal with challenging people
2	Be able to provide a reception service	2.1	Welcome visitors in accordance with organisational standards
		2.2	Direct visitors to the person they are visiting in accordance with organisational standards
		2.3	Record visitors' arrivals and departures in accordance with organisational procedures
		2.4	Provide advice and accurate information within organisational guidelines on confidentiality
		2.5	Keep the reception area tidy and materials up-to-date
		2.6	Answer and deal with telephone calls within organisational standards
		2.7	Adhere to organisational procedures on entry, security, health and safety
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAC312 Provide reception services</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

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

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAA411 Support the organisation of meetings</li> <li>• CFABAA412 Plan and organise meetings</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Unit Title		Prepare text from notes using touch typing	
Level		2	
Credit Value		4	
GLH		26	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to create text from notes	1.1	Explain the importance of confirming the purpose of the text and intended audience
		1.2	Describe the problems that may occur in transcribing notes written by others
		1.3	Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
		1.4	Explain how technology features can help to create, format and check the accuracy of text
		1.5	Describe ways of checking produced texts for accuracy and correctness
		1.6	Describe organisational procedures for the storage, security and confidentiality of information
2	Be able to produce text using touch typing	2.1	Agree the purpose, format and deadlines for texts
		2.2	Touch type texts at the speed and level of accuracy required by the organisation
		2.3	Check that the text is accurate and the meaning is clear and correct
		2.4	Store texts and original notes safely and securely following organisational procedures
		2.5	Present texts in the required formats and within the agreed timescales
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAA213a Prepare text from notes using touch typing</li> <li>• CFABAA213b Prepare text from notes using touch typing (40 wpm)</li> <li>• CFABAA213c Prepare text from notes using touch typing (60 wpm)</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Manage diary systems	
Level		2	
Credit Value		2	
GLH		12	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the management of diary systems	1.1	Explain the importance of keeping diary systems up to date
		1.2	Describe the basis on which bookings and changes are prioritised
		1.3	Explain any constraints relating to making bookings for people or facilities
		1.4	Describe the types of problems that can occur when managing diaries
2	Be able to manage diary systems	2.1	Obtain the information needed to make diary entries
		2.2	Make accurate and timely diary entries
		2.3	Respond to changes in a way that balances and meets the needs of those involved
		2.4	Communicate up-to-date information to everyone involved
		2.5	Keep diaries up-to-date
		2.6	Maintain the requirements of confidentiality
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA431 Use a diary system</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Collate and report data	
Level		2	
Credit Value		3	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to collate and report data	1.1	Describe the different ways that data can be organised
		1.2	Explain why data should be presented and reported in different ways
		1.3	Explain the use of text and diagrams in helping readers to understand the presented data
		1.4	Explain the requirements relating to confidentiality, data protection, intellectual property and copyright legislations
2	Be able to collate data	2.1	Ensure that data collected is complete, accurate and up-to-date
		2.2	Check the data against agreed criteria
		2.3	Organise data in a way that will enable meaningful analysis
		2.4	Meet agreed timescales in the collation of data
3	Be able to report data	3.1	Present data in the agreed reporting format and house style
		3.2	Report data within agreed timescale
		3.3	Distribute data reports to authorised readers
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAD321 Collate and organise data</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Contribute to the organisation of an event	
Level		2	
Credit Value		3	
GLH		23	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand event organisation	1.1	Explain the roles, responsibilities and accountabilities of individuals involved in the event
		1.2	Explain the purpose and features of different types of events
		1.3	Describe the type of resources needed for different types of events
		1.4	Describe the different needs attendees may have and how to meet these
		1.5	Explain the requirements of health, safety and security when organising events
		1.6	Describe the types of problems that may occur during events and how to deal with them
2	Be able to carry out pre-event actions	2.1	Identify venue requirements for an event
		2.2	Obtain resources within the agreed timescales
		2.3	Distribute pre-event documentation to delegates in accordance with the event plan
		2.4	Co-ordinate attendee responses within the agreed timescale
		2.5	Identify any special requirements of event attendees
3	Be able to set up an event	3.1	Set up layout and resources in accordance with the event plan
		3.2	Confirm that all identified resources are in place and meet requirements
		3.3	Behave in a way that maintains organisational values and standards
4	Be able to carry out post-event actions	4.1	Ensure the venue is restored to the required conditions in accordance with the terms of the contract
		4.2	Carry out follow-up actions in accordance with the event plan and agreements made at the event

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAA311 Support the organisation and co-ordination of events</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>



Unit Title		Employee rights and responsibilities	
Level		2	
Credit Value		2	
GLH		16	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the role of organisations and industries	1.1	Explain the role of their own occupation within an organisation and industry
		1.2	Describe career pathways within their organisation and industry
		1.3	Identify sources of information and advice on an industry, occupation, training and career pathway
		1.4	Describe an organisation's principles of conduct and codes of practice
		1.5	Explain issues of public concern that affect an organisation and industry
		1.6	Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2	Understand employers' expectations and employees' rights and obligations	2.1	Describe the employer and employee statutory rights and responsibilities that affect their own role
		2.2	Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
		2.3	Describe the procedures and documentation that protect relationships with employees
		2.4	Identify sources of information and advice on employment rights and responsibilities
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Prepare text from shorthand	
Level		2	
Credit Value		6	
GLH		46	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to use shorthand to create text	1.1	Explain the importance of confirming the purpose of the text and intended audience
		1.2	Describe techniques that may be used when taking shorthand notes
		1.3	Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
		1.4	Explain how technology features can help to create, format and check the accuracy of text
		1.5	Describe ways of checking produced texts for accuracy and correctness
		1.6	Describe organisational procedures for the storage, security and confidentiality of information
2	Be able to use shorthand to prepare text	2.1	Agree the purpose, format and deadlines for texts
		2.2	Take dictation using shorthand at the speed required by the organisation
		2.3	Input and format text from shorthand notes
		2.4	Check that text is accurate and the meaning is clear and correct
		2.5	Store texts and original notes safely and securely following organisational procedures
		2.6	Present texts in the required formats and within the agreed timescales
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAD311 Prepare text from shorthand</li> <li>• CFABAD311a Prepare text from shorthand (60 wpm)</li> <li>• CFABAD311b Prepare text from shorthand (80 wpm)</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Buddy a colleague to develop their skills	
Level		2	
Credit Value		3	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to buddy a colleague	1.1	Describe what is expected of a buddy
		1.2	Explain techniques to give positive feedback and constructive criticism
		1.3	Explain techniques to establish rapport with a buddy
2	Be able to plan to buddy a colleague	2.1	Agree which aspects of a colleague's work may benefit from buddying
		2.2	Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
		2.3	Agree a schedule of meetings that minimise disruption to business
		2.4	Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3	Be able to support a buddy colleague carrying out work activities	3.1	Remain unobtrusive while a buddy colleague carries out their work activities
		3.2	Provide examples of how to carry out tasks correctly
		3.3	Identify instances of good practice and areas for improvement through observation
		3.4	Praise a buddy colleague on well completed tasks
		3.5	Give constructive feedback on ways in which a buddy could improve performance
		3.6	Offer a buddy hints and tips based on personal experience
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Customer Service (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFACSD5249 Buddy a colleague to develop their customer service skills</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Store and retrieve information	
Level		2	
Credit Value		4	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand information storage and retrieval	1.1	Describe systems and procedures for storing and retrieving information
		1.2	Outline legal and organisational requirements for information security and retention
		1.3	Explain how to create filing systems to facilitate information identification and retrieval
		1.4	Explain how to use different search techniques to locate and retrieve information
		1.5	Describe what to do when problems arise when storing or retrieving information
2	Be able to gather and store information	2.1	Gather the information required within the agreed timescale
		2.2	Store files and folders in accordance with organisational procedures
		2.3	Store information in approved locations
		2.4	Adhere to organisational policies and procedures, legal and ethical requirements
3	Be able to retrieve information	3.1	Confirm information to be retrieved and its intended use
		3.2	Retrieve the required information within the agreed timescale
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAD332 Store and retrieve information using a filing system</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Administer parking dispensations	
Level		2	
Credit Value		3	
GLH		25	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the administration of parking dispensations	1.1	Explain the scope and limits of their own responsibilities and authority in issuing parking dispensations
		1.2	Describe the legal and regulatory requirements relating to parking dispensations
		1.3	Describe the parking dispensation eligibility criteria and checks
		1.4	Describe organisational security and anti-fraud policies, procedures and processes
		1.5	Describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges
		1.6	Explain where to go for help when dealing with parking dispensations
2	Be able to process applications for parking dispensations	2.1	Advise customers of the eligibility criteria for parking dispensations
		2.2	Determine whether customers are eligible by matching the case to the criteria
		2.3	Clarify any areas of doubt or confusion with customers
		2.4	Carry out relevant checks in accordance with organisational procedures and legislative procedures
		2.5	Record the reasons for the decision as to whether or not to grant parking dispensations
		2.6	Maintain the requirements of confidentiality and data protection
3	Be able to issue parking dispensations	3.1	Communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures
		3.2	Process payments and refunds in accordance with organisational procedures
		3.3	Keep records up-to-date
		3.4	Adhere to organisational policies and procedures, legal and ethical requirements

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFASPA1 Administer parking permits, suspensions and dispensations</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Unit Title		Administer finance	
Level		2	
Credit Value		4	
GLH		21	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand finance for administrators	1.1	Describe organisational hierarchy and levels of authority for financial transactions
		1.2	Explain organisational systems for sales invoicing, purchasing, payments and receipts
		1.3	Describe the use of a purchase order, invoice, receipts and expenses
2	Be able to administer finance	2.1	Record income and expenditure in accordance with organisational policies and procedures
		2.2	Process purchase orders, invoices or expenses in accordance with organisational policies and procedures
		2.3	Process outgoing payments to the correct recipient
		2.4	Accept or allocate incoming payments in accordance with organisational policies
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Prepare text from recorded audio instruction	
Level		2	
Credit Value		4	
GLH		15	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the preparation of text from recorded notes	1.1	Explain the importance of confirming the purpose of the text and intended audience
		1.2	Describe the main features of the different types of technology that can be used for playing back recordings
		1.3	Explain how different speaking styles of those giving dictation can affect outputs
		1.4	Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
		1.5	Describe ways of checking produced texts for accuracy and correctness
		1.6	Describe organisational procedures for the storage, security and confidentiality of information
2	Be able to prepare text from recorded notes	2.1	Agree the purpose, format and deadlines for texts
		2.2	Input and format text from audio recording
		2.3	Check that text is accurate and the meaning is clear and correct
		2.4	Store texts and original recordings safely and securely following organisational procedures
		2.5	Present texts in the required formats and within the agreed timescales
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAD312 Prepare text from recorded audio instruction</li> <li>• CFABAD312a Prepare text from recorded audio instruction (40 wpm)</li> <li>• CFABAD312b Prepare text from recorded audio instruction (60 wpm)</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	



Unit Title		Archive information	
Level		2	
Credit Value		3	
GLH		14	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand archiving requirements	1.1	Describe different ways of archiving information
		1.2	Describe how to retrieve archived information
		1.3	Describe organisational procedures for archiving, retrieving and deleting information
		1.4	Explain the importance of document retention policies to organisations'
		1.5	Describe the security and access requirements of offsite archives
2	Be able to archive information	2.1	Confirm the information to be archived
		2.2	Identify the retention period post-archiving
		2.3	Archive information within the agreed timescale
		2.4	Keep archive records up-to-date and indexed
		2.5	Report problems to the right person
		2.6	Adhere to organisational policies and procedures, legal and ethical requirements when archiving information
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAD334 Provide archive services</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Administer human resource records	
Level		2	
Credit Value		3	
GLH		28	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the administration of human resource (HR) records	1.1	Explain what HR-related information needs to be kept and why
		1.2	Explain the relationship of HR to other parts of an organisation
		1.3	Describe the impact of other organisations on HR activities
		1.4	Describe the features and uses of organisational systems for managing human resource information
		1.5	Explain the requirements of confidentiality, data protection and system security
		1.6	Describe the information to be provided for different management reports
		1.7	Explain the limits of their own authority in administering HR records
		1.8	Explain the implications of not keeping HR records up-to-date
		1.9	Explain the actions to be taken in the event of problems arising or incomplete or inaccurate data
2	Be able to administer HR information	2.1	Keep HR records up-to-date
		2.2	Process data in accordance with organisational procedures
		2.3	Provide information within the limits of confidentiality
		2.4	Adhere to organisational policies and procedures, legal and ethical requirements
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAB151 Administer human resource records</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Produce business documents	
Level		2	
Credit Value		3	
GLH		24	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to prepare business documents	1.1	Explain the requirements for language, tone, image and presentation for different documents
		1.2	Explain how to integrate images into documents
		1.3	Describe how corporate identity impacts upon document production
		1.4	Explain the requirements of data protection, copyright and intellectual property legislation relating to document production
		1.5	Describe organisational procedures for version control
		1.6	Describe security requirements relating to document production
2	Be able to prepare business documents	2.1	Identify the purpose, audience, content, style, format and deadlines of a document
		2.2	Use document production resources in line with organisational guidelines
		2.3	Use correct grammar, spelling, punctuation and sentence structure
		2.4	Produce documents that meet the requirements within the agreed timescale
3	Be able to distribute business documents	3.1	Provide final documents in the appropriate medium for authorised readers
		3.2	Specify restrictions and distribution lists in accordance with the requirements
		3.3	Maintain the requirements of security in the production, distribution and storage of documents
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA211 Produce documents in a business environment</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Produce minutes of meetings	
Level		2	
Credit Value		3	
GLH		13	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to take minutes of meetings	1.1	Explain the purpose of different types of minutes and other meeting records
		1.2	Explain the legal requirements of formal minutes
		1.3	Describe organisational conventions for producing minutes
		1.4	Describe the responsibilities of the minute taker in a meeting
		1.5	Explain why it is important to maintain confidentiality of meetings, discussions and actions
		1.6	Explain why it is necessary to record who proposed and seconded suggestions and changes
2	Be able to take notes of meetings	2.1	Take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings
		2.2	Record allocated responsibilities for agreed actions
3	Be able to produce minutes of meetings	3.1	Transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style
		3.2	Include agreed attachments or appendices
		3.3	Obtain approval for the final documents
		3.4	Distribute minutes to the agreed distribution list
		3.5	Maintain the requirements of confidentiality
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA441 Take minutes</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Meet and welcome visitors in a business environment	
Level		1	
Credit Value		2	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know how to meet visitors in a business environment	1.1	State an organisation's procedures for dealing with visitors
		1.2	Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors
		1.3	Identify any organisational health, safety and security requirements relevant to visitors
		1.4	Describe what to do and who to contact when problems with visitors arise
2	Be able to meet visitors in a business environment	2.1	Welcome visitors politely in accordance with organisational standards
		2.2	Confirm the identity of visitors and the reasons for their visit
		2.3	Check that any health, safety and security actions are carried out
		2.4	Record visitors' arrival and departure in accordance with organisational procedures
		2.5	Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards
		2.6	Present a positive personal image in accordance with organisational standards
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAC311 Meet and welcome visitors</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Health and safety in a business environment	
Level		1	
Credit Value		2	
GLH		10	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand health and safety responsibilities in a business environment	1.1	State health and safety responsibilities of employers
		1.2	State their own responsibilities for health and safety in the business environment
		1.3	State the occupational health and safety guidelines to be followed when using a keyboard and visual display unit
		1.4	Explain the importance of complying with health and safety requirements
2	Know how to work in a safe way in a business environment	2.1	Identify possible health and safety hazards in the business environment
		2.2	Describe ways in which accidents can be avoided in the business environment
		2.3	Outline why it is important to report hazards and accidents that occur in the business environment
		2.4	Outline organisational emergency health and safety procedures
3	Be able to comply with health and safety requirements in a business environment	3.1	Use approved techniques to prevent strain or injury when carrying out work activities
		3.2	Take action to ensure that their own conduct does not endanger others
		3.3	Follow manufacturers or organisational instructions for the use of equipment, materials and products
		3.4	Follow organisational procedures and legal requirements to minimise risks to health and safety
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAE141 Use occupational and safety guidelines when using a workstation</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Use a telephone and voicemail system	
Level		1	
Credit Value		2	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know how to use a telephone and voicemail system	1.1	Outline how a caller's experiences affect their view of an organisation
		1.2	Outline organisational standards and procedures for communicating on the telephone
		1.3	State the importance of following organisational standards and procedures when making and receiving telephone calls
		1.4	State organisational fault reporting procedures
		1.5	Describe why it is important to follow security and data protection procedures when using a telephone system
		1.6	State the information to be given out when transferring calls, taking or leaving messages
		1.7	State organisational guidelines for deleting voicemail messages
2	Be able to make telephone calls	2.1	Identify the reason for making a call
		2.2	Obtain the name and number(s) of the person to be contacted
		2.3	Communicate information to achieve the call objective(s)
		2.4	Communicate in a way that meets organisational standards and guidelines
3	Be able to receive telephone calls	3.1	Identify the caller in accordance with organisational procedures
		3.2	Deal with calls in accordance with organisational procedures
		3.3	Pass calls to the right person/department
		3.4	Take messages when the person to be contacted is unavailable
		3.5	Represent an organisation in a way that meets the required standards and guidelines
4	Be able to use voicemail systems	4.1	Use voicemail systems in accordance with manufacturers' instructions

		4.2	Keep the voicemail message system up to date
		4.3	Pass on accurate messages in accordance with organisational policies
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAA621 Make and receive telephone calls</li> <li>• CFABAA622 Use voicemail message systems</li> </ul>		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)		



Unit Title		Contribute to the development and implementation of an information system	
Level		3	
Credit Value		6	
GLH		21	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the design and implementation of an information system	1.1	Explain the types of information to be managed by a system
		1.2	Explain how information will be used and by whom
		1.3	Explain who needs to be consulted in the design and implementation of an information system and why
		1.4	Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system
2	Be able to contribute to the development of an information system	2.1	Confirm the purpose, use and features of an information system
		2.2	Identify the information that will be managed by the system
		2.3	Confirm requirements for reporting information
		2.4	Recommend the functions that will be used to manipulate and report information
		2.5	Develop guidance for the use of an information system that is accurate and easy to understand
		2.6	Recommend user access and security levels for the information system
		2.7	Make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints
		2.8	Participate in system tests in accordance with the specification
3	Be able to contribute to the implementation of an information system	3.1	Implement the information system in accordance with the plan, minimising disruption to business
		3.2	Confirm that staff are trained to use the system prior to its launch
		3.3	Resolve or report problems or faults with the information system within the limits of their own authority

		3.4	Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAD111 Support the design and development of information system</li> </ul>		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)		

Unit Title		Monitor information systems	
Level		3	
Credit Value		8	
GLH		43	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how information systems are used	1.1	Explain how the intended use of reports affects the choice of format and language
		1.2	Explain how the audience of reports affects the choice of format and language
		1.3	Explain the features of different problem-solving techniques related to information systems
		1.4	Evaluate the suitability of possible problem-solving actions related to information systems
		1.5	Explain techniques to validate the reliability of information
		1.6	Analyse the suitability of different evaluation techniques related to information systems
		1.7	Assess the potential consequences of breaches of confidentiality
		1.8	Evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information
2	Be able to monitor information systems	2.1	Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements
		2.2	Carry out monitoring activities in accordance with the plan
		2.3	Provide training and support to system users that is appropriate to their needs
		2.4	Identify the cause of problems with an information system
		2.5	Suggest solutions to problems with an information system
		2.6	Recommend adaptations to the system in response to identified problems or developments

		2.7	Adhere to organisational policies and procedures, and legal and ethical requirements when monitoring information systems
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAD131 Monitor information systems</li> </ul>		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)		

Unit Title		Develop a presentation	
Level		3	
Credit Value		3	
GLH		11	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to develop a presentation	1.1	Explain best practice in developing presentations
		1.2	Explain who needs to be consulted on the development of a presentation
		1.3	Explain the factors to be taken into account in developing a presentation
		1.4	Analyse the advantages and limitations of different communication media
2	Be able to develop a presentation	2.1	Identify the purpose, content, style, timing and audience for a presentation
		2.2	Select a communication media that is appropriate to the nature of a presentation, message and audience
		2.3	Tailor a presentation to fit the timescale and audience's needs
		2.4	Prepare a presentation that is logically structured, summarises the content and addresses the brief
		2.5	Take action to ensure that a presentation adheres to organisational guidelines and policies
		2.6	Develop materials that support the content of a presentation
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA617 Develop a presentation</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Deliver a presentation	
Level		3	
Credit Value		3	
GLH		17	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the principles underpinning the delivery of presentations	1.1	Analyse the advantages and limitations of different methods of, and media for, making presentations
		1.2	Explain how the type and size of the audience affects the delivery of a presentation
		1.3	Explain the factors to be taken into account in developing contingency plans when delivering presentations
		1.4	Explain voice projection and timing techniques when delivering presentations
		1.5	Explain the factors to be taken into account in responding to questions from an audience
		1.6	Explain different methods for evaluating the effectiveness of a presentation
2	Be able to prepare to deliver a presentation	2.1	Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation
		2.2	Develop contingency plans for potential equipment and resource failure
		2.3	Take action to ensure that the presentation fits the time slot available
3	Be able to deliver a presentation	3.1	Speak clearly and confidently, using language that is appropriate for the topic and the audience
		3.2	Vary their voice tone, pace and volume appropriately when delivering a presentation
		3.3	Use body language in a way that reinforces messages
		3.4	Use equipment and resources effectively when delivering a presentation
		3.5	Deliver a presentation within the agreed timeframe
		3.6	Respond to questions in a way that meets the audience's needs
		3.7	Evaluate the effectiveness of a presentation

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAA623 Deliver a presentation</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Unit Title		Analyse and present business data	
Level		3	
Credit Value		6	
GLH		24	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the analysis and presentation of business data	1.1	Explain the uses and limitations of primary and secondary data
		1.2	Explain the uses and limitations of quantitative and qualitative data
		1.3	Evaluate the issues relating to the validity and reliability of data and its analysis
		1.4	Explain the use of IT tools to carry out research
		1.5	Assess the risks attached to making judgments based on limited or unrepresentative samples
		1.6	Assess the risks attached to generalizing research findings
		1.7	Explain different formats and techniques for the presentation of the analysis
2	Be able to analyse quantitative and qualitative business data	2.1	Agree the parameters of the analysis
		2.2	Clarify any ethical requirements of the analysis
		2.3	Organise the data in a way that will facilitate its analysis
		2.4	Select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives
		2.5	Apply analytical techniques that are appropriate to the purpose of the research and the nature of the data
		2.6	Confirm the accuracy of data analysis and make necessary adjustments
		2.7	Draw conclusions that are valid and supported by evidence
3	Be able to present the analysis of business data	3.1	Present data in the agreed reporting format and house style
		3.2	Acknowledge the limitations of the analysis
		3.3	Reference data sources



<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAD322 Analyse and report data</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Unit Title		Maintain and issue stationery and supplies	
Level		2	
Credit Value		3	
GLH		18	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the maintenance of stationery and supplies	1.1	Describe organisational policies, procedures and levels of authority in maintaining supplies
		1.2	Explain how to carry out a stock check of stationery
		1.3	Describe the types of problems that may occur with deliveries and stock items
		1.4	Explain how to deal with problems that occur with deliveries and stock items
		1.5	Explain the factors to take into account when ordering stationery
		1.6	Explain the benefits and limitations of different potential suppliers, against organisational requirements
		1.7	Explain how to calculate quantities of stationery and supplies to be ordered
		1.8	Describe how to dispose of or recycle waste
2	Be able to maintain stocks of stationery and supplies	2.1	Maintain stocks of stationery and supplies at the required levels
		2.2	Maintain the requirements of storage and security
		2.3	Carry out stock checks in accordance with organisational policies and procedures
		2.4	Chase up late or incorrect orders with suppliers
3	Be able to issue stock of stationery and supplies	3.1	Issue stationery and supplies in accordance with organisational requirements
		3.2	Maintain up-to-date records of stock issued, received and in storage
		3.3	Deal with unwanted or damaged stationery and supplies safely
		3.4	Recommend ways in which the system for receiving and issuing stock could be improved

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAF141 Maintain and issue stock items</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Unit Title		Use and maintain office equipment	
Level		2	
Credit Value		2	
GLH		10	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to use office equipment	1.1	Describe organisational policies, procedures and levels of authority in maintaining office equipment
		1.2	Describe how to use different types of office equipment
		1.3	Explain the reasons for following manufacturer's and organisational instructions when operating equipment
		1.4	Describe the types of equipment faults likely to be experienced and the correct way of dealing with these
2	Be able to use and maintain office equipment	2.1	Use the equipment that is appropriate to the task in accordance with the manufacturer's instructions
		2.2	Follow organisational procedures to keep waste to a minimum
		2.3	Maintain the equipment to the standard specified by the organisation or the manufacturer
		2.4	Make sure that equipment conforms with health and safety requirements
		2.5	Report problems that cannot be resolved to the right person
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFABAA231 Use office equipment</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

## Optional Group C

Unit Title		Using Email	
Level		2	
Credit Value		3	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Use e-mail software tools and techniques to compose and send messages	1.1	Select and use software tools to compose and format e-mail messages, including attachments
		1.2	Determine the message size and how it can be reduced
		1.3	Send e-mail messages to individuals and groups
		1.4	Describe how to stay safe and respect others when using e-mail
		1.5	Use an address book to organise contact information
2	Manage incoming e-mail effectively	2.1	Follow guidelines and procedures for using e-mail
		2.2	Read and respond to e-mail messages appropriately
		2.3	Use email software tools and techniques to automate responses
		2.4	Describe how to archive e-mail messages, including attachments
		2.5	Organise, store and archive e-mail messages effectively
		2.6	Respond appropriately to e-mail problems
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a> Simulation of work tasks and activities must take place in a realistic working environment.	

Unit Title		Bespoke Software	
Level		2	
Credit Value		3	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Input and combine information using bespoke applications	1.1	Input relevant information accurately so that it is ready for processing
		1.2	Select and use appropriate techniques to link and combine information of different forms or from different sources within the software
		1.3	Respond appropriately to data entry error messages
2	Use appropriate structures to organise and retrieve information efficiently	2.1	Describe what functions to apply to structure and layout information effectively
		2.2	Select and use appropriate structures and/or layouts to organise information
		2.3	Apply local and/or legal guidelines and conventions for the storage and use of data where available
3	Use the functions of the software effectively to process and present information	3.1	Select and use appropriate tools and techniques to edit, process and format information
		3.2	Check information meets needs, using IT tools and making corrections as necessary
		3.3	Select and use appropriate methods to present information
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a> Simulation of work tasks and activities must take place in a realistic working environment.	

Unit Title		Spreadsheet Software	
Level		2	
Credit Value		4	
GLH		30	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Use a spreadsheet to enter, edit and organise numerical and other data	1.1	Identify what numerical and other information is needed in the spreadsheet and how it should be structured
		1.2	Enter and edit numerical and other data accurately
		1.3	Combine and link data across worksheets
		1.4	Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2	Select and use appropriate formulas and data analysis tools to meet requirements	2.1	Identify which tools and techniques to use to analyse and manipulate data to meet requirements
		2.2	Select and use a range of appropriate functions and formulas to meet calculation requirements
		2.3	Use a range of tools and techniques to analyse and manipulate data to meet requirements
3	Select and use tools and techniques to present and format spreadsheet information	3.1	Plan how to present and format spreadsheet information effectively to meet needs
		3.2	Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
		3.3	Select and format an appropriate chart or graph type to display selected information
		3.4	Select and use appropriate page layout to present and print spreadsheet information
		3.5	Check information meets needs, using spreadsheet tools and making corrections as necessary
		3.6	Describe how to find errors in spreadsheet formulas
		3.7	Respond appropriately to any problems with spreadsheets
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	

<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a></p> <p>Simulation of work tasks and activities must take place in a realistic working environment.</p>
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Unit Title		Data Management Software	
Level		2	
Credit Value		3	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Enter, edit and maintain data records in a data management system	1.1	Describe the risks to data security and procedures used for data protection
		1.2	Enter data accurately into groups of records to meet requirements
		1.3	Locate and amend data associated with groups of records
		1.4	Check data records meet needs, using IT tools and making corrections as necessary
		1.5	Respond appropriately to data entry and other error messages
		1.6	Apply local and/or legal guidelines for the storage and use of data where available
2	Retrieve and display data records to meet requirements	2.1	Identify what queries and reports need to be run to output the required information
		2.2	Select and use queries to search for and retrieve information to meet given requirements
		2.3	Create and view reports to output information from the system to meet given requirements
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a> Simulation of work tasks and activities must take place in a realistic working environment.	

Unit Title		Presentation Software	
Level		2	
Credit Value		4	
GLH		30	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Input and combine text and other information within presentation slides	1.1	Identify what types of information are required for the presentation
		1.2	Enter text and other information using layouts appropriate to type of information
		1.3	Insert charts and tables into presentation slides
		1.4	Insert images, video or sound to enhance the presentation
		1.5	Identify any constraints which may affect the presentation
		1.6	Organise and combine information of different forms or from different sources for presentations
		1.7	Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
2	Use presentation software tools to structure, edit and format slide sequences	2.1	Identify what slide structure and themes to use
		2.2	Select, change and use appropriate templates for slides
		2.3	Select and use appropriate techniques to edit slides and presentations to meet needs
		2.4	Select and use appropriate techniques to format slides and presentations
		2.5	Identify what presentation effects to use to enhance the presentation
		2.6	Select and use animation and transition effects appropriately to enhance slide sequences
3	Prepare slideshow for presentation	3.1	Describe how to present slides to meet needs and communicate effectively
		3.2	Prepare slideshow for presentation
		3.3	Check presentation meets needs, using IT tools and making corrections as necessary
		3.4	Identify and respond to any quality problems with presentations to ensure that presentations meet needs

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>N/A</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a> Simulation of work tasks and activities must take place in a realistic working environment.</p>

Unit Title		Word Processing Software	
Level		2	
Credit Value		4	
GLH		30	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Enter and combine text and other information accurately within word processing documents	1.1	Identify what types of information are needed in documents
		1.2	Use appropriate techniques to enter text and other information accurately and efficiently
		1.3	Select and use appropriate templates for different purposes
		1.4	Identify when and how to combine and merge information from other software or other documents
		1.5	Select and use a range of editing tools to amend document content
		1.6	Combine or merge information within a document from a range of sources
		1.7	Store and retrieve document and template files effectively, in line with local guidelines and conventions where available
2	Create and modify layout and structures for word processing documents	2.1	Identify the document requirements for structure and style
		2.2	Identify what templates and styles are available and when to use them
		2.3	Create and modify columns, tables and forms to organise information
		2.4	Select and apply styles to text
3	Use word processing software tools to format and present documents effectively to meet requirements	3.1	Identify how the document should be formatted to aid meaning
		3.2	Select and use appropriate techniques to format characters and paragraphs
		3.3	Select and use appropriate page and section layouts to present and print documents
		3.4	Describe any quality problems with documents
		3.5	Check documents meet needs, using IT tools and making corrections as necessary

		3.6	Respond appropriately to quality problems with documents so that outcomes meet needs
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a> Simulation of work tasks and activities must take place in a realistic working environment.	

Unit Title		Website Software	
Level		2	
Credit Value		4	
GLH		30	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Create structures and styles for websites	1.1	Describe what website content and layout will be needed for each page
		1.2	Plan and create web page templates to layout
		1.3	Select and use website features and structures to help the user navigate round web pages within the site
		1.4	Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand
		1.5	Describe how copyright and other constraints may affect the website
		1.6	Describe what access issues may need to be taken into account
		1.7	Describe what file types to use for saving content
		1.8	Store and retrieve files effectively, in line with local guidelines and conventions where available
2	Use website software tools to prepare content for websites	2.1	Prepare content for web pages so that it is ready for editing and formatting
		2.2	Organise and combine information needed for web pages including across different software
		2.3	Select and use appropriate editing and formatting techniques to aid both clarity and navigation
		2.4	Select and use appropriate development techniques to link information across pages
		2.5	Change the file formats appropriately for content
		2.6	Check web pages meet needs, using IT tools and making corrections as necessary
3	Publish websites	3.1	Select and use appropriate testing methods to check that all elements of websites are working as planned
		3.2	Identify any quality problems with websites and how to respond to them

		3.3	Select and use an appropriate programme to upload and publish the website
		3.4	Respond appropriately to problems with multiple page websites
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	N/A		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	<p>See IT User Assessment Strategy available from <a href="http://www.e-skills.com">www.e-skills.com</a></p> <p>Simulation of work tasks and activities must take place in a realistic working environment.</p>		

Unit Title		Deliver customer service	
Level		2	
Credit Value		5	
GLH		27	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand customer service delivery	1.1	Explain the relationship between customers' needs and expectations and customer satisfaction
		1.2	Describe the features and benefits of an organisation's products and/or services
		1.3	Explain the importance of treating customers as individuals
		1.4	Explain the importance of balancing promises made to customers with the needs of an organisation
		1.5	Explain when and to whom to escalate problems
		1.6	Describe methods of measuring their own effectiveness in the delivery of customer service
2	Understand the relationship between customer service and a brand	2.1	Explain the importance of a brand to an organisation
		2.2	Explain how a brand affects an organisation's customer service offer
		2.3	Explain the importance of using customer service language that supports a brand promise
		2.4	Identify their own role in ensuring that a brand promise is delivered
3	Be able to prepare to deal with customers	3.1	Keep up to date with an organisation's products and/or services
		3.2	Prepare resources that are necessary to deal with customers before starting work
4	Be able to provide customer service	4.1	Maintain organisational standards of presentation and behaviour when providing customer service
		4.2	Adapt their own behaviour to meet customers' needs or expectations
		4.3	Respond to customers' requests in line with organisational guidelines
		4.4	Inform customers of the progress of their requests
		4.5	Confirm that customers' expectations have been met in line with the service offer



		4.6	Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5	Be able to support improvements to customer service delivery	5.1	Identify ways that customer service could be improved for an organisation and individuals
		5.2	Share information and ideas with colleagues and/or service partners to support the improvement of service delivery
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFACSA1 Maintain a positive and customer-friendly attitude</li> <li>• CFACSA2 Behave in a way that gives a good customer service impression</li> <li>• CFACSA4 Give customers a positive impression of yourself and your organisation</li> <li>• CFACSA7 Live up to the brand promise when delivering customer service</li> <li>• CFACSA8 Make customer service personal</li> <li>• CFACSB1 Do your job in a customer friendly way</li> <li>• CFACSB2 Deliver reliable customer service</li> <li>• CFACSF2 Deliver customer service within the rules</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Participate in a project	
Level		3	
Credit Value		3	
GLH		19	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to manage a project	1.1	Explain the features of a project business case
		1.2	Explain the stages of a project lifecycle
		1.3	Explain the roles of people involved in a project
		1.4	Explain the uses of project-related information
		1.5	Explain the advantages and limitations of different project monitoring techniques
		1.6	Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources
2	Be able to support the delivery of a project	2.1	Fulfil their role in accordance with a project plan
		2.2	Collect project-related information in accordance with project plans
		2.3	Use appropriate tools to analyse project information
		2.4	Report on information analysis in the agreed format and timescale
		2.5	Draw issues, anomalies and potential problems to the attention of project managers
		2.6	Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> <li>CFAM&amp;LFA5 Manage projects</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Processing customers' financial transactions	
Level		2	
Credit Value		4	
GLH		8	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to deal with customer transactions and documentation	1.1	Receive payments from and/or make payments to customers
		1.2	Confirm that amounts and balances are accurate
		1.3	Process payments accurately in accordance with the organisation's procedures
		1.4	Recognise discrepancies in documentation and take appropriate action
		1.5	Make sure that all documentation, entries and records are accurate and legible
2	Be able to comply with all codes, laws and regulatory requirements	2.1	Follow the organisation's systems, procedures and organisational timescales
		2.2	Explain the organisation's customer service and complaints procedure
		2.3	Act within personal authority limits and recognising when to refer to others
		2.4	Explain the sources of information and advice within the organisation
		2.5	Identify the different methods of receiving financial information
		2.6	Comply with legal requirements, industry regulations, organisational policies and professional codes
		2.7	Explain the organisation's requirements relating to the application of codes, laws and regulatory requirements and their impact on the job role
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Payroll Processing	
Level		2	
Credit Value		5	
GLH		20	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to use HMRC approved tools to calculate income tax	1.1	Apply the tax code for an employee from given information
		1.2	Process pre-tax deductions correctly
		1.3	Process accurately a variety of Tax Codes using HMRC approved tools: <ul style="list-style-type: none"> <li>• standard suffix codes operated on a cumulative or non-cumulative basis</li> <li>• BR code operated on a cumulative basis</li> <li>• NT</li> <li>• OT</li> <li>• D0</li> <li>• D1</li> </ul>
		1.4	Identify the authority required to change an employee's tax code and process the change accurately
2	Be able to determine national insurance contributions to be deducted from gross pay	2.1	Process accurately for NI categories A, C and D, using approved HMRC Tools: <ul style="list-style-type: none"> <li>• employee NI contributions</li> <li>• employer NI Contributions</li> </ul>
3	Be able to determine voluntary deductions and non-standard statutory deductions	3.1	Process voluntary deductions in an appropriate way
		3.2	Process other statutory deductions: <ul style="list-style-type: none"> <li>• Deductions from earnings orders</li> <li>• Scottish arrestment orders</li> <li>• Student loan repayments</li> </ul>
4	Be able to produce relevant pay period reports	4.1	Produce a P11 or equivalent
		4.2	Produce payslips or equivalent, to detail statutory, non-statutory and organisational information regarding employees' individual pay.
		4.3	Produce payment schedules for different methods of making payments to employees
5	Be able to record and reconcile payments and deductions to employees and external agencies	5.1	Produce an internal payroll summary to record and itemise payments and deductions, including employer's NIC
		5.2	Reconcile payments and deductions made from employees pay with the total payroll

		5.3	Prepare Employer Payment Summaries in line with the tax authority's requirements
	Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	N/A	
	Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assignment or end examination	

Unit Title		Process information about customers	
Level		2	
Credit Value		3	
GLH		14	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to process customer information	1.1	Describe the functions of customer information systems
		1.2	Explain the way in which legislation and regulatory requirements affect the processing of customer information
		1.3	Explain different responsibilities and levels of authority for processing customer service information
		1.4	Explain the reliability of sources of customer information
		1.5	Explain the validity of customer information
2	Be able to process customer information	2.1	Record information about customers in line with organisational standards and procedures
		2.2	Keep customer information up to date
		2.3	Respond to requests for customer information from authorised people in a timely manner
		2.4	Retrieve customer information that meets the requirements of the request
		2.5	Supply customer information in a format appropriate for the recipient
		2.6	Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFACSA6 Process information about customers</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

Unit Title		Develop customer relationships	
Level		2	
Credit Value		3	
GLH		18	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to develop customer relationships	1.1	Describe the importance of developing relationships with customers
		1.2	Explain the value of customer loyalty and retention
		1.3	Explain how customers' expectations may change over time
		1.4	Explain the use of customer feedback as a means of developing customer relationships
		1.5	Explain the limits of their own authority to make alternative service offers to customers
		1.6	Describe the use of Customer Relationship Management systems and processes to meet customers' expectations
		1.7	Explain the importance of regular communication in the development of both internal and external customer relationships
2	Be able to develop relationships with customers	2.1	Give help and information that meets or exceeds customers' expectations
		2.2	Identify new ways of helping customers based on their feedback
		2.3	Share feedback from customers with others
		2.4	Identify added value that the organisation could offer customers
		2.5	Bring to customers' attention products or services that may interest them
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>CFACSD1 Develop customer relationships</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		Skills CFA Assessment Strategy Competence units (S/NVQ)	

## Optional Group D

Unit Title		Understand the use of research in business	
Level		2	
Credit Value		6	
GLH		40	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the research process	1.1	Describe the main stages in the research process
		1.2	Explain the importance of scoping research and setting the research objectives
		1.3	Explain the importance of identifying the limitations of research methods
		1.4	Explain the difference between primary and secondary research
		1.5	Describe the difference between quantitative and qualitative research methods
		1.6	Describe the advantages and disadvantages of different research methods
		1.7	Describe the use of different analytical techniques in the research process
		1.8	Explain the importance of validity and reliability in the research process
2	Understand how to use research in business	2.1	Outline the limitations of applying research outcomes
		2.2	Explain why and how to use sources of current and archived business information
		2.3	Explain how to validate research information
		2.4	Describe the purpose and applications of research in business
		2.5	Describe organisational conventions and formats for presenting research reports
		2.6	Explain the organisational policy for acknowledging sources of information
		2.7	Explain ways in which ethics can affect the conduct and use of research



<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Business &amp; Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFABAD323 Research information</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>

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

		4.8	Describe the impact of human rights legislation on the employment relationship
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFABAH111 Support the monitoring and evaluation of trends and events that affect organisations</li> </ul>		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A		

Unit Title		Principles of marketing theory	
Level		2	
Credit Value		4	
GLH		30	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to segment the market	1.1	Explain the importance of defining market segments
		1.2	Describe the difference between market segments and customer classifications
		1.3	Explain how to cluster customers with similar characteristics
		1.4	Describe how a range of products may appeal to different market segments
		1.5	Describe the importance of valid and reliable marketing data to segmenting the market
		1.6	Explain the strengths and weaknesses of different marketing data collection methods
		1.7	Describe the use of Customer Relationship Management (CRM) activities and systems
2	Understand the value of marketing	2.1	Describe the role of marketing in enhancing the sale of products and/or services
		2.2	Explain the significance of customer loyalty to the achievement of marketing objectives
		2.3	Explain the role of performance indicators and evaluation arrangements
		2.4	Describe the factors to be taken into account when assessing the cost and value of marketing activities
		2.5	Explain the significance of brand and reputation to sales performance
3	Understand the principles of socially responsible marketing	3.1	Explain the scope and purpose of socially responsible marketing
		3.2	Explain the importance of involving stakeholders in socially responsible marketing activities
		3.3	Explain how core values are expressed through coherent branding and chosen communication methods
		3.4	Explain the requirements of socially responsible marketing campaigns

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<ul style="list-style-type: none"> <li>• Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</li> <li>• Marketing 1.3.3 Establish and understand potential market segments</li> <li>• Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</li> <li>• Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</li> <li>• Marketing 2.1.3 Demonstrate the value of marketing to the organisation</li> <li>• Marketing 4.1.3 Manage communications for social marketing programmes</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.</p>

Unit Title		Principles of digital marketing	
Level		2	
Credit Value		5	
GLH		40	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the role of digital marketing	1.1	Explain the role of digital marketing within the overall marketing strategy
		1.2	Explain the strengths and weaknesses of digital marketing
		1.3	Explain the importance of targeted digital marketing
		1.4	Describe the sources of data lists for use in targeting customers and potential customers
		1.5	Explain the legal requirements and implications of digital marketing
		1.6	Describe the importance of digital data capture systems for digital marketing
2	Understand the use of search engine optimisation (SEO)	2.1	Describe the use of SEO
		2.2	Explain the importance of SEO
		2.3	Explain the advantages and disadvantages of links to other websites
3	Understand the requirements of marketing research using the internet	3.1	Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
		3.2	Explain the advantages and disadvantages of different internet data collection sources
		3.3	Explain the importance of confirming the accuracy of information retrieved from the internet
4	Understand the uses of digital marketing devices and messages	4.1	Describe the potential uses of a Customer Relationship Management (CRM) system
		4.2	Explain the importance of data cleansing
		4.3	Describe the use of digital marketing devices
		4.4	Describe the use of digital response systems
		4.5	Explain the advantages and disadvantages of different tracking systems

5	Understand how to use digital technology for marketing purposes	5.1	Explain how to use a CRM system
		5.2	Explain how to maintain the currency and accuracy of digital databases
		5.3	Explain the advantages and disadvantages of different digital technologies
		5.4	Describe the importance of tailoring messages to different digital media
		5.5	Explain the potential for marketing to social networking sites
		5.6	Explain how to prevent marketing messages being identified as "spam"
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		<ul style="list-style-type: none"> <li>Marketing 4.3.8 Market to target customers using digital/electronic media</li> <li>Marketing 4.3.9 Communicate using multiple digital marketing channels</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.	

Unit Title		Principles of customer relationships	
Level		2	
Credit Value		3	
GLH		18	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand customers and their needs	1.1	Describe the importance of understanding customers' wants and needs
		1.2	Explain the role of segmentation in identifying customers' likely wants and needs
		1.3	Describe the factors that motivate customers to buy
		1.4	Explain the importance of seeking customer feedback on performance, products and/or services
2	Understand an organisation's responses to customer relationships	2.1	Describe an organisation's marketing objectives and activities
		2.2	Explain the importance of developing customer service plans and customer relationship plans
		2.3	Describe an organisation's system for relationship management
		2.4	Describe an organisation's customer care programme
		2.5	Describe the system for communicating with customers
		2.6	Explain the importance of a consistent level of service
		2.7	Explain the link between customer satisfaction and sales growth
		2.8	Explain the importance of using customer feedback to enhance performance, products and/or services
3	Understand the principles of customer relationship management	3.1	Explain the concept and principles of relationship management
		3.2	Explain the importance of keeping promises made to customers
		3.3	Explain the importance of balancing customers' needs with those of the organisation
		3.4	Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them
		3.5	Explain how to identify added value that could be offered to customers



<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<ul style="list-style-type: none"> <li>• Marketing 7.1.2 Build and deliver customer service and customer care support Marketing 7.1.3 Build and retain effective sales relationships</li> <li>• Marketing 7.1.4 Assist in the development of sales support and customer management programmes</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.</p>

Unit Title		Understand working in a customer service environment	
Level		1	
Credit Value		3	
GLH		25	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the importance of customer service	1.1	State what is meant by “customer service”
		1.2	State why effective customer service is important to an organisation
2	Know the factors affecting customer service	2.1	Outline the difference between an internal and an external customer
		2.2	State how to identify customers’ needs and expectations
		2.3	List information sources needed to deliver reliable customer service
		2.4	Describe the relationship between customer expectations and customer satisfaction
3	Know how to work in a customer service role	3.1	Identify personal behaviours that can positively affect customers’ perceptions of an organisation and its products and/or services
		3.2	Identify the job roles within a team delivering customer service
		3.3	State the standards of personal presentation and behaviour expected by customer service staff in different organisations
		3.4	State standards and practices that relate to a service offer within different types of organisation
		3.5	Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
		3.6	Describe the procedures for protecting customers’ personal information and safety
		3.7	State the importance of protecting customers’ personal information and safety
4	Know how to refer customer queries and problems to others	4.1	Describe types of customer behaviour that show when a customer is dissatisfied
		4.2	State the procedures to be followed when dealing with customer queries or problems
		4.3	State to whom to refer customer queries and problems

<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Customer Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> <li>• CFACSA4 Give customers a positive impression of yourself and your organization</li> <li>• CFACSB2 Deliver reliable customer service</li> <li>• CFACSC1 Recognise and deal with customer queries, requests and problems</li> <li>• CFACSF3 Show understanding of customer service principles</li> </ul>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>

Unit Title		Know how to publish, integrate and share using social media	
Level		2	
Credit Value		5	
GLH		40	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the current social networks used to publish, integrate and share online	1.1	Identify the main social media networks in current use
		1.2	Describe the main features of each social media network identified
		1.3	Describe why they would use each of the social media networks identified
		1.4	Explain the purpose of a 'social aggregator' tool
		1.5	Describe how blogs give individuals a voice on the Web
		1.6	Explain how professionals make connections using social media networks
2	Understand how social media is used by individuals, organisations/businesses, governments and social groups	2.1	Describe why <ul style="list-style-type: none"> <li>• individuals</li> <li>• organisations/businesses</li> <li>• governments</li> <li>• social groups</li> </ul> use social media networking sites
		2.2	Explain the advantages and typical components of a social media user profile
		2.3	Identify the benefits of using social media networking for: <ul style="list-style-type: none"> <li>• individuals</li> <li>• organisations/businesses</li> <li>• governments</li> <li>• social groups</li> </ul>
		2.4	Identify the risks of using social media networking for: <ul style="list-style-type: none"> <li>• individuals</li> <li>• organisations/businesses</li> <li>• governments</li> <li>• social groups</li> </ul>
		2.5	Describe how social media networks monitor engagement with their websites

		2.6	Describe the advantages of podcasting
		2.7	Explain why organisations have social media policies
3	Understand best practices for safe social networking	3.1	Describe appropriate precautions to ensure their own safety and privacy
		3.2	Describe how to protect personal information when engaging with social media websites
		3.3	Identify legal constraints on the uploading and downloading of software and other digital content
4	Use browser software to communicate information online	4.1	Select and use appropriate tools and techniques to communicate information online
		4.2	Use browser tools to share information sources with others
		4.3	Submit information online
		4.4	Identify opportunities to create, post or publish material to social media websites
5	Understand the need for safety and security practices	5.1	Describe the danger of computer viruses and how to minimise risks
		5.2	Describe how to minimise threats to information security when online
		5.3	Describe how to minimise the threats to user safety when online
		5.4	Describe where to access online help and information when using social media networks
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Exploring Social Media	
Level		2	
Credit Value		2	
GLH		16	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the opportunities and threats associated with using social media.	1.1	Describe the positive and negative aspects of using social media.
		1.2	Describe how to minimise risks associated with using social media.
2	Understand the application of social media.	2.1	Describe how various social media sites may be used by groups, individuals, businesses and organisations.
		2.2	Demonstrate the use of various social media sites to communicate and upload content including: a) Facebook b) Blogging c) Twitter d) YouTube
		2.3	Describe how businesses and organisations may use social media to promote products and services.
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		N/A	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Understand the safe use of online and social media platforms	
Level		2	
Credit Value		4	
GLH		35	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand that information stored on personal computers and mobile devices must be safeguarded	1.1	Identify the potential risks to information security of using personal computers and mobile devices for: <ul style="list-style-type: none"> <li>• using email</li> <li>• web browsing</li> <li>• banking online</li> <li>• shopping online</li> <li>• social networking</li> </ul>
		1.2	Describe the security risks associated with: <ul style="list-style-type: none"> <li>• hardware</li> <li>• software</li> <li>• social media networking</li> <li>• access to malicious websites</li> <li>• access to inappropriate material published on the Internet</li> <li>• corrupted or infected email attachments</li> </ul>
		1.3	Explain the importance of controlling access to hardware, software and stored data
		1.4	Describe the common types of scams and frauds: <ul style="list-style-type: none"> <li>• phishing</li> <li>• pharming</li> <li>• hacking</li> </ul>
		1.5	Explain the importance of developing and maintaining safe ICT user habits
2	Know how to select and use appropriate security methods to safeguard systems and data	2.1	Describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords
		2.2	Describe common ways of controlling access to hardware, software and data
		2.3	Identify ways to protect data and software
		2.4	Describe the term 'virus' and give examples of different types

		2.5	Describe the purpose of anti-virus software
		2.6	Explain why anti-virus software should be regularly updated
		2.7	Explain the importance of backing up and safely storing data
3	Understand the threats to personal safety when using the Internet	3.1	Describe the forms and features of: <ul style="list-style-type: none"> <li>• cyberbullying</li> <li>• grooming</li> <li>• stalking</li> <li>• criminal activities</li> <li>• inappropriate contact</li> <li>• inappropriate content</li> </ul>
		3.2	Identify when and how to report online safety issues
		3.3	Describe the risks and consequences of: <ul style="list-style-type: none"> <li>• identity theft</li> <li>• identity fraud</li> </ul>
		3.4	Describe how user accounts can be used as a security measure when computers are used by more than one person
		3.5	Explain the importance of setting parental controls on personal computers, mobile and media devices
		3.6	Explain how to set up parental controls on: <ul style="list-style-type: none"> <li>• personal computers</li> <li>• tablets</li> <li>• mobile phones</li> </ul>
4	Know how to protect their online devices against fraud and security attacks	4.1	Set up security measures to protect their personal computers and mobile devices against fraud and security threats
		4.2	Describe measures that can help to protect their personal information
		4.3	Describe the risks posed by unsolicited email and measures that can reduce the risks
		4.4	Identify the security threats when accessing public WiFi networks
5	Understand the implications of entering personal information	5.1	Explain the concept of no 'take backs' once information is posted online



	onto social media networking sites	5.2	Identify who can view information posted onto social media networking websites
		5.3	Explain the privacy issues of using social media websites
		5.4	Describe formal and informal conventions, or netiquette, which should be observed when communicating online
		5.5	Describe the potential consequences of posting their personal information onto social media websites
		5.6	Identify the security risks of adding geographic identity or location to material they upload to the Internet
6	Understand legal measures that address the protection of data	6.1	Identify relevant legislation and guidelines relating to <ul style="list-style-type: none"> <li>• downloading images and files from the Internet</li> <li>• data protection</li> </ul>
		6.2	Identify data protection issues around the use of social media
		6.3	Describe what is meant by the following terms: <ul style="list-style-type: none"> <li>• copyright</li> <li>• plagiarism</li> <li>• intellectual property</li> </ul>
		6.4	Explain why organisations develop and adopt policies for the acceptable use of ICT
		6.5	Describe the common components of an Acceptable Use Policy
	Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	N/A	
	Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A	

Unit Title		Principles of equality and diversity in the workplace	
Level		2	
Credit Value		2	
GLH		10	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the implications of equality legislation	1.1	Define the concept 'equality and diversity'
		1.2	Describe the legal requirements for equality of opportunity
		1.3	Describe the role and powers of organisations responsible for equality
		1.4	Explain the benefits of equal opportunities and diversity
		1.5	Explain the potential consequences for an organisation of failing to comply with equality legislation
2	Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1	Explain how organisational policies on equality and diversity translate into day to day activity in the workplace
		2.2	Describe their own responsibilities for equality and diversity in the workplace
		2.3	Describe behaviours that support equality, diversity and inclusion in the workplace
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)		Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> <li>CFAM&amp;LBA7 Promote equality of opportunity, diversity and inclusion</li> </ul>	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		N/A	

Unit Title		Principles of team leading	
Level		2	
Credit Value		5	
GLH		37	
Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand leadership styles in organisations	1.1	Describe characteristics of effective leaders
		1.2	Describe different leadership styles
		1.3	Describe ways in which leaders can motivate their teams
		1.4	Explain the benefits of effective leadership for organisations
2	Understand team dynamics	2.1	Explain the purpose of different types of teams
		2.2	Describe the stages of team development and behaviour
		2.3	Explain the concept of team role theory
		2.4	Explain how the principle of team role theory is used in team building and leadership
		2.5	Explain typical sources of conflict within a team and how they could be managed
3	Understand techniques used to manage the work of teams	3.1	Explain the factors to be taken into account when setting targets
		3.2	Describe a range of techniques to monitor the flow of work of a team
		3.3	Describe techniques to identify and solve problems within a team
4	Understand the impact of change management within a team	4.1	Describe typical reasons for organisational change
		4.2	Explain the importance of accepting change positively
		4.3	Explain the potential impact on a team of negative responses to change
		4.4	Explain how to implement change within a team
5	Understand team motivation	5.1	Explain the meaning of the term "motivation"
		5.2	Explain factors that affect the level of motivation of team members
		5.3	Describe techniques that can be used to motivate team members

		5.4	Explain how having motivated staff affects an organisation
	Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFAM&amp;LBA3 Lead your team</li> </ul>	
	Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A	

# Appendix A

## Skills CFA Realistic Working Environment Guidelines

Realistic Working Environment (RWE) can be applied to the following units:

Unit	Level
D/506/1794 Health and safety in a business environment	1
K/506/1796 Use a telephone and voicemail system	1
A/506/1799 Meet and welcome visitors in a business environment	1
D/502/9928 Principles of marketing theory	2
D/502/9931 Principles of digital marketing	2
K/503/8194 Principles of customer relationships	2

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

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

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

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