ilm

**Institute of Leadership
& Management**

INTERNATIONAL QUALIFICATION IN MANAGEMENT

IQual Certificate in Middle Management

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INTERNATIONAL QUALIFICATIONS IN MANAGEMENT
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SECTION A: GENERAL QUALIFICATION INFORMATION

UNDERSTANDING THE FORMAT OF THE QUALIFICATIONS

- **Qualification Structure**. A qualification consists of credit based units of assessment. Each qualification will specify which units are mandatory and which are optional.

- **Qualification Sizes**. The sizes of the qualifications are specified in terms of the **minimum** total credits required. An Award is between 1-12 credits, a Certificate between 13-36 credits and a Diploma is more than 36 credits.

- **Learning Time**. One credit is equal to 10 hours of learning time. Learning time includes the average time it takes a learner to complete the learning outcomes. This could include tutorial time, group work, private study, reading, research, practical learning, work-based learning and assessment.

- **Guided Learning Hours**. Each qualification includes the minimum guided learning hours required for quality and funding purposes. Guided learning hours are the time that a member of staff is available to guide learners (this could include tutorials, guided reading, facilitated discussion, one-to-one feedback, online guidance etc).

The table below shows the difference between Guided Learning Hours and Learning Time

	Tutor Directed/Facilitated	Learner Directed	Assessment
Guided Learning Hours	- Induction - Tutorials and tutorial support time - Directed activities such as role play, case studies etc - Facilitated Group discussion - Action Learning Sets - Supervised work-based learning or practice - Directed on-line learning - Guidance prior to assessment		
Learning Time (formerly known as Notional Learning Time)	- Induction - Tutorial and tutorial support time - Directed activities such as role play, case studies etc - Facilitated Group discussion - Action Learning Sets - Supervised work-based learning or practice - Directed on-line learning - Guidance prior to assessment	- Reading - Research - Self-study - Discussion with relevant others in the workplace - Practice in the workplace - Online learning packages	Time taken for candidate to complete assessment

- **Level**. The level of a qualification indicates its complexity, the depth of learning required and the learner autonomy.

- **Certification**. Most learners will opt for full qualifications; however Certificates of Unit Credit are available for individual units if learners are registered on the Unit Payment Route.

ILM MEMBERSHIP

All registered candidates automatically become studying members of the ILM for one year, free of charge, and can enjoy a range of member benefits accessible through the ILM website. Membership can be activated online any time at www.i-l-m.com/activate. For further information contact Membership on 01543 266886 or send an email to membership@i-l-m.com. Studying membership includes:

Leadership and Management Development

- Online materials from Harvard Business Publishing on leading and motivating, delegating, time management, finance and budgeting, team management and coaching.
- Harvard's Stepping up to Management for first time managers to achieve immediate success.
- Skills files to provide quick overviews of key management topics.
- Resource guides with suggestions for useful books, articles and websites.
- A free place at an ILM evening event of your choice – join other members to hear guest speakers on topics such as coaching, leadership, confidence building, and networking.

ILM publications

- Receive *Edge* online, ILM's flagship leadership and management magazine by email nine times a year.
- Monthly e-bulletin, Newsroom, with topical leadership and management stories.

Career development

- Find the job you love with the ILM jobs board.
- Advice on presenting a professional image and dressing for success.
- Expert advice on writing a winning CV, successful interviews, working with recruitment agencies, plus recruiting the right people to fill your vacancies from the ILM Career Centre.

Resource Centre

- E-journals.
- Book loan service (UK only) and e-books.
- Reading lists for ILM qualifications, organised by qualification level.
- Study support for ILM qualifications at all levels.
- Resource guides for suggestions for useful books, articles and websites.
- Useful web links.

Lifestyle

- New Money-saving discounts on:
  - Insurance – car, home, professional indemnity, medical.
  - Business – meeting venues, office supplies, books, tax returns.
  - Leisure – CDs and DVDs, magazines, eye care, bed and breakfast, hotels, family days out, airport parking, foreign exchange, roadside assistance, health clubs, holidays, childcare.

Studying members are encouraged to upgrade to the appropriate professional grade of membership to enjoy additional benefits which will support their career and personal development.

APPROVAL FOR THE QUALIFICATION

Check that the centre has approval for the qualification/units it is intending to offer. If not, liaise with the Business Manager for any add-on approvals.

OCCUPATIONAL COMPETENCE

Tutors and/or those responsible for Centre (Independent Assessment)

Occupational Competence	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	• Information prepared for learners. Examples of this include schemes of work, candidate handbooks, guidance notes, lesson plans, tutorials etc. • Participation in CPD in relation to the relevant field and qualification requirements. • A qualification at the appropriate level in support of the relevant qualification.
Relevant and credible experience in the field of the relevant qualification.	• Current/recent experience appropriate to the level and key roles of the relevant qualification.
A qualification in support of assessment.	• Ideally hold D32 (workplace assessing qualification) and/or D33 (using diverse evidence qualification) or A1 (combination of D32 and D33). • Ideally hold or working towards the ILM Level 4 Award in Vocational Assessment of Leadership and Management.

Internal Verifiers

Occupational Competence	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	• Information prepared for learners. Examples of this include schemes of work, candidate handbooks, guidance notes, lesson plans, tutorials etc. • Participation in CPD in relation to the relevant field and qualification requirements. • A qualification at the appropriate level in support of the relevant qualification.
Relevant and credible experience in the field of the relevant qualification.	• Current/recent experience appropriate to the level and key roles of the relevant qualification.
Ideally hold or working towards a qualification in support of assessment and verification.	• Ideally hold D32 and/or D33. • Ideally hold or working towards A1. • Ideally hold or working towards the ILM Level 4 Award in Vocational Assessment of Leadership and Management. • Ideally hold D34 (Award for Internal Verifiers). • Ideally hold or working towards V1 (Award for Internal Verifiers).
Experience and a working knowledge of the operational and assessment processes for the relevant qualification.	• Demonstrating understanding of the organisation's management centre policies, procedures and practices. • Demonstrating knowledge and understanding of ILM's quality assurance policy, procedures and requirements. Recent assessment experience in the relevant field.

ENTRY REQUIREMENTS AND RECRUITMENT

- Candidates **must** be in a position to meet the assessment demands, which are work-based and reflective of nature. Ideally candidates should use their workplace as the basis for their assignments; however, candidates who are not employed could use their work in a voluntary organisation or work in an organisation with which they are familiar to complete their assignments.

- Candidates should have a level of literacy and numeracy appropriate to the International Qualification (IQual) they will be working towards. Centres may provide support to intending learners who do not have this level of literacy and numeracy.

- Learners who are sponsored by their employers and those without such sponsorship are equally eligible.

- Centres are required to demonstrate commitment to equal opportunities when recruiting. Guidance is available in the ILM Centre Manual.

- The ILM Centre Manual provides guidance for Centres in making arrangements for learners requiring Reasonable Adjustments or Special Considerations in respect of assessment. This should be done as early in the programme as possible.

PLANNING DELIVERY

- Select units to meet the needs of individuals and/or sponsoring organisation(s) ensuring that the credit value of these units adds up to the minimum number of credits required for the qualification.

- In selecting units ensure that the maximum credit for an Award does not exceed 12 credits and a Certificate 36 Credits.   The Unit Payment Route should be used for any additional units (once the bands have been exceeded).

- Decide on the method of delivery (ie: workshops, use of distance learning materials).

- Schedule diagnostic phases as appropriate.

- Plan tutorial support for the programme and for assessment.

- Prepare session plans to ensure the learning outcomes are met.

- Compile a resource list. This is a requirement for all qualifications that are level 4 or above. Resources may include books, journals, websites, DVDs, audio files etc.

- Select assessment methods to be used for optional units (ie: use of ILM materials) seeking External Verifier (EV) advice if appropriate. If summative assessment includes group work, the assessor must be able to assess individual learners against each of the unit(s) assessment criteria.

- Ensure that all staff who are to be involved in delivery, assessment and internal quality assurance have been authorised by ILM.

COMPILING A SCHEME OF WORK (SOW)

The SOW should show the Learner Journey. The type of information that should be included in this document is as follows:

- Information that will be shared with candidates during induction.
- Which mandatory and optional units are being delivered (including their levels and credit values). It should be clear whether the units are being delivered individually or whether they are being delivered in a thematic modular way (combinations of units and/or learning outcomes).
- It should be clear what tutor and candidate activities will enable the Learning Outcomes to be achieved (for example tutorials, workshops, group exercises, prescribed reading, research, reflection, role play, on-line learning etc). Reading, research and reflection are essential components for levels 4, 5, 6 and 7. Estimated times should also be included for the various activities.
- The names of the tutors who will be involved in delivery (and what components they will deliver).
- What assessment vehicles will be used (this should include both formative and summative assessment).
- The SOW should clearly show how the minimum guided learning hours for the qualification are accounted for.

INDUCTION

Each programme must start with a short induction which should include the following:

- An outline of the qualification and the related learner support available.
- The aims of the programme.
- Format of the programme (content, delivery methods, hours, attendance etc).
- The assessment requirements (assessment methods, support and resources available, submission dates, to whom assignments should be submitted, appeals procedure, plagiarism, any special considerations etc).
- Information on tutorial support, advice and guidance, equal opportunities, appeals procedures, authenticity and plagiarism.
- Roles and responsibilities of centre staff, learners and ILM.
- Learning and study skills, including reference to use of library, internet and any open or on-line learning to be used.
- Free ILM studying membership and benefits.
- Expectations of, and benefits to, the individual and where relevant, their employer.
- Information about Learner Records and Fair Processing.
- Links with S/NVQs and/or Key or Core Skills where appropriate.

LEARNER REGISTRATION

- Full details of registration procedures are to be found in the ILM Centre Manual.
- It is strongly advised that candidate Unique Learner Numbers (ULNs) be obtained or verified prior to registration with ILM, in order to simplify the process, and to ensure that learners' successes can be recorded on their Learner Records (LRs). Further information about ULNs can be obtained at the Managing Information Across Partners (MIAP) Helpdesk on 08456 022589 or LRSsupport@miap.gov.uk or www.miap.gov.uk/lrs.
- Learners must be registered with ILM within **four weeks** of the beginning of a programme lasting more than **three** months, or within **one week** for programmes of shorter duration.
- Registration should be completed electronically via the Walled Garden, although a paper-based system is available if required.

PROGRAMME DELIVERY AND TUTORIAL SUPPORT

- Deliver the programme as scheduled, maintaining records of session attendance, or completion of distance learning as appropriate.
- Provide, and maintain records of, tutorial support (including dates and duration) for learners with particular emphasis on integrated and unit assessments.
- The time for tutorial support is shown in the Qualification Specific Information (Section B).

ASSESSMENT STRATEGY

- All units included in a qualification must be assessed. This includes both mandatory and optional units.
- Units can be assessed individually or in clusters (integrated).
- The assessment must address all of the assessment criteria for the relevant unit(s).
- Methodologies should be work-related and reflective as far as possible and should provide organisational benefits and lead to individual development.

Mandatory Units

- Assessment for mandatory units is prescribed.
- Any enhancement to the mandatory assessment (for example, including additional optional units to the mandatory assessment) must be agreed in writing by your ILM Quality Manager.
- Although you may integrate the assessment, you must still use the mandatory mark sheet (thus for marking purposes you will have a mark sheet for the mandatory components and a mark sheet for the optional components). This is simply to ensure a clear audit trail until this process becomes embedded and more mature. The ILM Quality Manager must ensure that an electronic copy of the agreed assessment is appended to the Centre's electronic file at the London office.
- In exceptional circumstances and to meet a specific need Centre's may deviate from the prescribed mandatory assessment. This must be done in full consultation with the quality manager and must be approved by them prior to use. The ILM quality manager must ensure that an electronic copy of the agreed assessment is appended to the Centre's electronic file at the London office. The alternative assessment should be work-based or reflective in nature.

Candidates must achieve 50% overall and a minimum of 33% (one third) for each section of the mandatory assessment. This is to ensure that candidates adequately complete all sections of the mandatory assignment(s).

- The ILM Quality Manager must forward an electronic copy of the agreed assessment to the Head of Quality and Administration at ILM so that this can be appended to the Centre's electronic file.
- Candidates who progress from an Award to a Certificate or from a Certificate to a Diploma at the same level will not have to repeat mandatory assessment. If however, a candidate has completed a mandatory unit as an option and then progresses from a smaller qualification to a larger qualification, they will have to complete the mandatory integrated assessment. They can use the work previously completed for the optional assessment as the base for the integrated assessment.
- Some qualifications allow a choice of Centre (Independent) or ILM (External) assessment. Where this choice exists this is shown in the Qualification Overview.
- All Centre (Independent) assessment is subject to review by the ILM Assessment Support Team (AST). This team may call in scripts from time to time to monitor consistency.

Optional Units

- Centres can assess optional units individually or in combination as integrated assessments. The latter will reduce the number of assessments and replicate the integrated nature of management.
- ILM has provided outline suggestions for optional units contained within a qualification. ILM also has 'ready-to-use' downloadable assessments for most of the management units available from Customer Services in Lichfield. An order form for purchasing these is available for download from the Centre Resources area of the ILM website
- Centres can develop their own assessment, but must use all assessment criteria for the unit(s).
- Candidates must achieve 50% for each optional assessment. Candidates are not required to pass each section in the optional units.

Integrating Assessment

Centres deciding to integrate units should start by looking at the various units and fully understand the learning outcomes before considering the following:
- Units that have some overlap.
- Units where the one may logically follow on from the other (sequence).
- Units where the knowledge required in one unit may be used to evidence the skill required in another.

A group brain-storming activity may be useful in identifying units that can be integrated.

Checklist for Integrating Assessment

Things to Consider	Tick
Decide which template you will use (ILM templates for mandatory units could be used. A mandatory assessment can be saved under a new name and the existing content stripped from this to form the template for the integrated assessment being developed).	
Cut and paste all the assessment criteria from the units that will be integrated into a template.	
Arrange the assessment criteria into a logical groupings (these may form the various sections for the assessment). A mind-map is useful when doing this.	
Choose an assessment method that is fit for purpose.	
Write the section guidance to the candidates at the appropriate level, paying careful attention to the verbs used in the assessment criteria. Give sufficient, clear and appropriate guidance to the learner throughout.	
Use appropriate section headings in the assessment that are descriptive and reflect the content.	
Check that the assessment guidance written matches the assessment criteria.	
Check that the assessment guidance allows the learner the opportunity to provide evidence for all the units assessment criteria.	
Check that the assessment is realistic and work-related (as far as possible).	
Check that the principles of assessment (VACS) have been adhered to.	
Check that the assessment is comprehensive, but clear and presents no artificial barriers to learners.	
Write a good, clear and comprehensive introduction to the assessment that accurately reflects the content.	
Give a relevant word count (if required).	
Allocate marks or a weighting to each section of the assessment based on the complexity of the work (do not only focus on the quantity of the work).	
Ask a competent colleague to check the assessment developed and give feedback.	

Assessment notes for candidates

The information shown below must be conveyed to candidates within the appropriate context:

- Where stated, select topics in your own organisation and/or area of work, (or within another organisation if you are currently unemployed).
- You may wish to discuss your choice of topics with your line manager or tutor prior to writing up your assessment(s).
- Structure your work by using the headings shown in bold when writing up your assessments.
- An approximate word count is shown for each mandatory assessment. This should be seen as a guide only, to help you achieve a balanced piece of work.
- The total marks available for each section and the minimum required to pass is shown in brackets on each mandatory assessment.
- The overall pass mark is 50 marks, but you also have to achieve the minimum marks in each section on the mandatory assessment.
- Candidates must achieve half the total marks (ie: at least 50 per cent) for each optional assessment.
- Study the assessment criteria shown for each unit carefully and check to see that your work "measures up" before you submit.
- Whilst you will not be penalised for weak spelling and grammar, you should remember that this may affect the meaning of your document. It is therefore expected that appropriate attention be given to such matters.
- Remember that your tutor is there to support and guide you.

- All material will be kept confidential and secure as far as is reasonably possible.
- Ask your tutor if you are not sure about the submission date.
- Ensure that you do your own work and do not plagiarise work from others. If you are not sure what is meant by plagiarism speak to your tutor who will clarify, or may provide you with some notes produced by ILM in the Centre Manual.

QUALITY ASSURANCE

- External verifiers have the right to contact learners as part of their routine quality assurance activities. This may be face-to-face, by telephone or e-mail.
- Centres must retain all marked scripts and mark-sheets (hard copy or electronic) for at least 6 months after receipt of the certificates from ILM to facilitate quality assurance and assessment review.
- Centres must also retain assessment records for at least 4 years.
- The role of the QA is to confirm or challenge the judgement of the assessor and to check consistency between assessors. Any inconsistencies should be referred back to the assessor. The QA should also check that the assessor is giving comprehensive objective feedback in line with the assessment criteria.

FINAL RESULTS

Centre (Independent) Assessment

- The results for all mandatory assessment(s) should be entered on the Schedule of Results for each candidate.
- Where a learner's initial attempt is unsuccessful, further attempts may be made before submitting the Schedule of Results.
- All re-assessments must be completed in sufficient time to claim certification before the registration period for the candidate expires.
- Where the Centre does **not** have direct claims status for the qualification, the signature of the EV **must** be obtained before claiming certification.
- Send the Schedule of Results to ILM London to claim certificates for successful candidates.

CERTIFICATES

- Final certificates will be issued to candidates on successful completion of all the mandatory and/or optional unit assessments required for a qualification. The certificate will be accompanied by a transcript listing the actual units achieved by the candidate. Where candidates complete more units than are required for the qualification, these will also be listed on the transcript.

- Certificates of Unit Credit can be claimed where candidates are registered on the Unit Payment Route, by entering successfully completed units onto the individual Schedule of Results.

SECTION B: INTERNATIONAL QUALIFICATION SPECIFIC INFORMATION

QUALIFICATION OVERVIEW:

IQual Certificate in Middle Management		
Purpose of the qualification	The IQual Certificate in Middle Management aims to give practising or potential managers the foundation for their formal development in this role. The qualification does this by developing basic middle management capability and assisting participants in gaining the knowledge required at this level. This qualification builds on the ILM IQual Award in Management, and broadens the skills and knowledge in a flexible and practical way. Candidates are not required to undertake the IQual Award as a pre-requisite and may join IQual Certificate programmes directly.	
Progression routes	IQual Diploma in Advanced Management	
Credit Value	Minimum 22 credits including 8 mandatory credits	
Induction	2 hours	
Tutorial Support	At least 2 hours	
Guided Learning Hours (this includes time for induction, tutorial support and the units guided learning hours)	Minimum 59 glh	
To be completed within	3 years	
Structure	**Mandatory Units**	**Credit Value**
	M4.01 Understanding the management role *15 glh*	4
	M4.02 Developing management skills *15 glh*	4
	Optional Units	**Credit Value**
	M3.10 Introduction to leadership *6 glh*	2
	M3.15 Managing stress in the workplace *8 glh*	1
	M3.18 Coaching and training your work team *7 glh*	2
	M3.33 Effective meetings for managers *4 glh*	2
	M3.34 Understanding workplace information systems *6 glh*	1
	M3.35 Marketing for managers *4 glh*	1
	M4.05 Managing equality and diversity in an organisation *14 glh*	3
	M4.06 Managing risk in the workplace *6 glh*	3
	M4.07 Motivating people in the workplace *6 glh*	2
	M4.08 Solving problems by making effective decisions in the workplace *16 glh*	3

QUALIFICATION OVERVIEW:

	M4.09 Delegating authority in the workplace *5 glh*	3
	M4.10 Managing and implementing change in the workplace *28 glh*	7
	M4.11 Developing and managing people in the workplace *20 glh*	5
	M4.12 Understanding the organisational culture and context *26 glh*	6
	M4.13 Communicating effectively orally and in writing in the workplace *4 glh*	3
	M4.16 Understanding work in contemporary society *8 glh*	3
	M4.17 Understanding entrepreneurship *6 glh*	2
	M4.18 Understanding accounting for management control *6 glh*	3
	M4.19 Understanding and interpreting financial data *6 glh*	3
	M4.20 Understanding the importance of marketing for an organisation *6 glh*	4
	M4.21 Using quantitative methods to solve management problems *10 glh*	5
	M4.22 Understanding the economics of the marketplace *10 glh*	6
	M4.23 Forecasting using quantitative methods *8 glh*	3
	M4.24 Developing your leadership styles *10 glh*	4
	M4.25 Developing individual mental toughness *5 glh*	2
	M4.26 Understanding the macro economic environment *25 glh*	7
	M4.27 Communication in management *18 glh*	4
	M4.28 Understanding financial management *18 glh*	2
	M4.29 Managing a healthy and safe environment *9 glh*	2
	M4.30 Managing meetings *15 glh*	3
	M4.31 Managing marketing *15 glh*	3
	M4.32 Analysing and presenting data to inform management decisions *10 glh*	2
	M5.08 Managing stress and conflict in the organisation *14 glh*	3
	M5.17 Managing resources *18 glh*	4
	M6.07 Conducting operations research *10 glh*	2
Assessment	Work Based Assignment – See Appendices B and C Centre (Independent Assessment only).	

APPENDIX A

Unit Specifications for
IQual Certificate in Middle Management

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Please note with regard to the Unit specifications:

1. The entry 'level' refers to the UK National Qualification Framework; the IQual Certificate in Middle Management has been mapped to this
2. Some of the entries in the 'Additional information' columns make reference to UK National Occupational Standards (NOS) this is for information only

Title:	Introduction to leadership (M3.10)
Level:	3
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand leadership styles	1.1 Identify the factors that will influence their choice of leadership styles or behaviours in workplace situations 1.2 Explain why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour
2. Understand leadership qualities and review own leadership qualities and potential	2.1 Assess own leadership behaviours and potential in the context of a particular leadership model and own organisation's working practices and culture, using feedback from others 2.2 Describe appropriate actions to enhance own leadership behaviour in the context of the particular leadership model

Additional information about the unit	
Unit purpose and aim(s)	To develop an introductory knowledge and understanding of leadership as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	

	Indicative Content:
1	- Differences and similarities between leadership and management, and the need for each of them - Range of at least three leadership models (such as trait, contingency, situational, distributive, servant oblique leader, transactional/transformational) and their significance for task performance, culture and relationships - Leadership behaviours and the sources of power
2	- Identification, development and appropriate choice of personal leadership styles and behaviours - The role of trust and respect in effective team leadership - Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Managing stress in the workplace (M3.15)
Level:	3
Credit value:	1

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand how to manage own stress and minimise stress in others	1.1 Examine the causes and impact of stress in the organisation 1.2 Describe the symptoms of stress in self and in others 1.3 Explain one practical stress management technique 1.4 Outline management responsibilities and actions in relation to work-related stress in the team
2 Know how to support individuals in the team	2.1 Explain how to decide when to provide advice, mentoring or counselling to support individuals in the workplace

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing stress as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C6 Links to SFEDI 2006 NOS: YS3, OP5, OP8
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	SFEDI Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008
Unit guided learning hours	8

Additional Guidance about the Unit
Indicative Content:

1	• Causes and impacts of stress at work • Symptoms of stress in self and in others • Implications of stress for workplace and non-work activities/relationships • Implications and effects of stress for individuals and organisations • Management responsibilities in relation to work-related stress • Simple practical stress management techniques • Sources of available support for stress sufferers • Action planning and review techniques
2	• Definitions of counselling, advising and mentoring and when to use each of them to support individuals • Principles of counselling • Mentoring, and the mentoring cycle • Range of available counselling and support mechanisms

Title:	Coaching and training your work team (M3.18)
Level:	3
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1　Understand training appropriate to the workplace	1.1　Clarify the training need 1.2　Explain two training techniques appropriate to the workplace situation 1.3　Explain how they could cater for different learning styles when training individuals in the workplace 1.4　Explain one relevant feedback technique that could work effectively in the workplace situation 1.5　Describe methods of evaluating the effectiveness of training 1.6　Explain how they could maintain training records
2　Understand how to coach an individual in an organisation	2.1　Clarify the coaching need 2.2　Explain how to plan the coaching for an individual in the organisation 2.3　Explain the importance of feedback in coaching 2.4　Describe one method of evaluating the effectiveness of coaching

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of coaching and training as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: D7
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008

Unit guided learning hours	7

Additional Guidance about the Unit

Indicative Content:

1	- Identifying when training is an appropriate method to address a development need - Training techniques appropriate to the workplace situation - Range of learning styles and their implications for training design - Relevant feedback techniques - Methods to evaluate effectiveness of training - Appropriate recording systems - Supervised practice or simulation to develop the ability to apply knowledge and skills
2	- Identifying when coaching is an appropriate method to address a development need - Coaching techniques as appropriate to the workplace situation - Role of feedback in coaching - Methods to evaluate effectiveness of coaching - Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Effective meetings for managers (M3.33)
Level:	3
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to manage and contribute to a meeting	1.1 Explain the purpose of an agenda 1.2 Describe how to prepare prior to a meeting 1.3 Explain the roles and responsibilities of the chairperson, the secretary and individuals at a meeting 1.4 Explain basic meeting protocol and procedures 1.5 Explain the purposes of minutes and action plans 1.6 Review own effectiveness at meetings

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of meetings as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008
Unit guided learning hours	4

Additional Guidance about the Unit

Indicative Content:

1	• The purpose, value and types of meeting • How to consult with others and prepare to contribute effectively to a meeting • How to organise a meeting (physical resources, agenda) • How to make an effective contribution to discussion/decision making during a meeting • Roles and responsibilities of the chairperson, the secretary and individuals at a meeting • Purposes of minutes and action plans • The importance of follow-up procedures after a meeting and how to use action plans to do so • Review of own effectiveness at meetings • Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Understanding workplace information systems (M3.34)
Level:	3
Credit value:	1

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the need to maintain information systems	1.1 Explain the purpose of record-keeping for the organisation 1.2 Identify key information to be recorded to meet organisational and legal requirements 1.3 Identify appropriate systems to store and retrieve information 1.4 Explain the need to control data access 1.5 Identify records which are included under relevant legislation (for example the UK Data Protection Act of 1998)
2 Understand the use and application of IT applications in an organisation	2.1 Identify different uses or applications of spreadsheets and/or databases in the organisation 2.2 Explain the value of electronic communication methods 2.3 Describe the back-up system for IT applications in the organisation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of information systems as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008

Unit guided learning hours	6

Additional Guidance about the Unit	
Indicative Content:	
1	• The purpose of record-keeping for the organisation including legal requirements • How to identify the essential content of records needed for internal and external use • Storage, indexing and information retrieval systems (manual and IT, as appropriate) • Confidentiality/security of records (level of access, backup, virus protection, legal aspects)
2	• Basics of using spreadsheets • Basics of using databases • Advantages and disadvantages of e-mail, internet and intranet • The method of IT backup within an organisation

Title:	Marketing for managers (M3.35)
Level:	3
Credit value:	1

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand basic marketing concepts	1.1 Explain the marketing concept and why it is relevant for managers 1.2 Conduct a simple organisational SWOT analysis in the marketing context 1.3 Describe the four elements of the marketing mix and give an example of how each is used within the context of the organisation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of information systems as required by a practising or potential first line manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B6, D3
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/01/2008
Unit guided learning hours	4

Additional Guidance about the Unit
Indicative Content:

1	• Simple definition of marketing and its relevance to managers • The idea of the Marketing Mix (product, price, place and promotion, and 7P model for services) and its relevance • Nature and role of market segmentation • Simple organisational SWOT analysis in the marketing context • Outline of market planning and its purpose • Sales promotion and advertising methods • Public and customer relations activities

Title:	Understanding the management role (M4.01)
Level:	4
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the organisation's purpose, stakeholders, structure and functional areas and managerial roles	1.1 Describe the organisation's purpose and its stakeholders 1.2 Explain the organisation's structure, functional areas and managerial roles
2 Understand the specific responsibilities of middle managers in enabling an organisation to achieve its goals	2.1 Describe the specific responsibilities of middle managers in enabling the organisation to achieve its goals
3 Understand how communication and interpersonal relationships affect managerial performance in the workplace	3.1 Explain how interpersonal relationships and communication skills affect managerial performance 3.2 Identify barriers to communications and effective interpersonal relationships in the organisation and devise strategies to overcome these
4 Evaluate personal development opportunities to improve own managerial	4.1 Critically assess own knowledge, skills, personal attributes and behaviour, and their effect on own managerial ability 4.2 Identify areas for personal development to improve own managerial behaviour 4.3 Plan and set priorities for future development

Additional information about the unit	
Unit purpose and aim(s)	To appreciate the nature of the middle manager role and their ability to perform effectively.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: A3, B1, B6, C4, D2, F8
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management

Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	15

Additional Guidance about the Unit

Indicative Content:

1	• The nature and purpose of organisations, including mission and value statements • Stakeholders and their objectives • Organisation charts, including hierarchical and matrix structures; indication of the range of operational functions • Levels of management and associated roles and responsibilities within organisation
2	• Profile and job functions of middle managers • Formal and informal organisational relationships • The management task, including planning, organising, motivating and controlling • Range of management styles • Differences between management and leadership
3	• Range of human behaviours, including how cultural and individual differences, verbal (esp. questioning and active listening skills) and non-verbal communication interact to affect understanding, and their effect on communication in the workplace • Methods/procedures to overcome particular communication challenges (e.g. those with learning difficulties, hearing impaired, visually impaired, foreign languages, etc) • Communications climate and culture • Importance of feedback skills to facilitate communication and workplace relationships • Networking skills
4	• Personal style and approach; image and presentation; non-verbal communication; social skills applicable to workplace • Respect for others; balance between trust and control • Attitudes to knowledge management and sharing of information • Personal management styles and their effects on situations and individuals

Title:	Developing management skills (M4.02)
Level:	4
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Gather and evaluate complex information from diverse sources through diverse media	1.1 Identify and agree with their manager and/or tutor a research topic which is relevant to the organisation 1.2 Gather secondary data from a wide range of academic, official and commercial sources in both print and electronic media 1.3 Analyse this data to judge its relevance and validity, make deductions and draw conclusions 1.4 Briefly describe the research methodology and acknowledge their sources
2 Review the findings from own and others' research	2.1 Present the findings and lead a group/seminar discussion about their research and briefly summarise the outcomes of the discussion 2.2 Actively participate in a group discussion
3 Review research activity and identify areas for improvement	3.1 Review how well they planned and conducted the research activity and identify areas for improvement

Additional information about the unit	
Unit purpose and aim(s)	To develop core research, analysis and group-working skills as needed by practising or potential middle managers.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007

Unit guided learning hours	15

Additional Guidance about the Unit

Indicative Content:

1	- Official (Governmental and supra-Governmental) and other (corporate, commercial, trade associations, societies, trades unions, etc) sources of information and information retrieval processes, including library classification systems, indexes, journals, trade magazines and the use of Internet search engines' advanced search features (i.e. Boolean searches) - Techniques for identifying relevant content from paper and electronic materials (using contents and index pages, skim-reading, using file/site search facilities) and criteria for judging the validity and appropriateness of information and sources - Making structured notes and cross-referencing materials for different purposes (e.g. essays, reports, presentations) - Using index cards, Mind Maps^{TM} and similar techniques to record and structure material, and build links between information from different sources - Note-taking and recording others' contributions in lectures, demonstrations, seminars and tutorials - Referencing - Development of bibliographies *Note: Candidates should be encouraged to investigate management topics that are of relevance to them and their role. This will develop a greater breadth of knowledge and will add value to their work performance.*
2	- Skills for engaging actively in, and leading, tutorial and seminar discussions - Basic principles of group dynamics and skills for working in self-managing groups - Skills for making formal presentations and/or demonstrations, alone and with others, to individuals and to groups, including: - Relevance of objectives, audience and contexts in relation to presentations - Options and constraints applicable to presentation – including time, duration, venue, equipment, language, etc) - Use of standard computer software, such as Microsoft PowerPoint - Non-IT visual aids for presentations (e.g. OHTs, models, handouts, demonstrations, etc) - Techniques for effective and flexible delivery - Techniques for controlling and responding to questions - Evaluation techniques (self and others) and performance improvement
3	- Setting and using SMART objectives to manage own work - Strategies to establish priorities (e.g. urgent/important grid) and make most effective use of time - Action and task planning techniques - Use of milestones to monitor progress - Importance of monitoring and revising plans in line with progress *Note: Tutors are recommended to deliver this unit first.*

Title:	Managing equality and diversity in an organisation (M4.05)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Manage equality and diversity in own specific functional area	1.1 Examine the type of culture within the organisation in relation to equality and diversity 1.2 Explain the development activities necessary to implement equality and diversity actions relevant to own specific functional area 1.3 Explain how they will manage equality and diversity on an ongoing basis in own functional area

Additional information about the unit	
Unit purpose and aim(s)	To explore the nature and origins of personal values, beliefs, attitudes and prejudices, and the impact that this can have on workplace behaviour and, in so doing, develop an understanding of the participant's role and responsibility in the valuing and managing of diversity.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B11 Links to KSF: Core Dimension 6 'Equality & Diversity' and provides evidence to support levels 3 & 4
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC) NHS Knowledge & Skills Framework
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/05/2008
Unit guided learning hours	14

Additional Guidance about the Unit
Indicative Content:

| 1 | Equality and diversity defined Diversity and its impact on the organisation Legislation and how it effects individuals, organisational policies and procedures Examining personal values, beliefs, attitudes and prejudice Language and diversity An overview of harassment, bullying and victimisation in the workplace Case studies: implementing reasonable adjustments in the workplace Examining the organisation/team in relation to diversity Case studies: employee relations Business diversity action planning Examples of good practice in equality and diversity |

Title:	Managing risk in the workplace (M4.06)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Conduct a risk assessment within the context of your workplace	1.1 Identify hazards and risks within the context of own workplace 1.2 Conduct a risk assessment within the context of own workplace
2 Examine how risk in the workplace can be minimised	2.1 Examine and explain how risk within own workplace can be minimised 2.2 Explain how any identified risks in own workplace will be continuously monitored and reviewed

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to manage risk within the context of their workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B10
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit
Indicative Content:

1	• Establishing the context and scope of the workplace • Applicable laws and legislation • Types of hazards and risks (environmental, technological, information, physical etc) • How to identify the circumstances and consequences of hazards and risks • Five steps to risk • Objective likelihood/probability, impact and score • Risk assessment procedure and associated documentation • Prioritisation of risk
2	• Identifying prevention and control measures • Avoidance, control, transfer to another entity or higher authority, retention (careful assessment and monitoring of risk) • Risk management registers • Compare actual results with results expected/predetermined • Monitoring and re-assessing the level and implications of risk

Title:	Motivating people in the workplace (M4.07)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Examine the factors that may affect performance and motivation in the workplace	1.1 Examine the principal factors that may affect performance and motivation in the workplace
2 Examine how levels of motivation could be improved to increase performance in the workplace	2.1 Analyse a theory of motivation and explain how this theory could be used to improve motivation levels and performance in the workplace

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to examine how levels of motivation can be improved to increase performance in the workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit
Indicative Content:

1	• Theories of motivation and their application to teams and individuals • Factors that affect performance and motivation (individual differences/needs, manager behaviour, the job and organisational context etc) • Styles and patterns of behaviour at work
2	• Theories of motivation and their application to teams and individuals • Range of techniques to motivate individuals and monitor performance • Positive approaches to offset negative attitudes in the workplace

Title:	Solving problems by making effective decisions in the workplace (M4.08)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1　Examine a problem in the context of the workplace	1.1　Define and diagnose a complex problem in the workplace including its scope and impact
2　Examine ways of resolving the problem	2.1　Search for and examine a range of alternative solutions to the problem 2.2　Compare and evaluate the alternative solutions, using a specific decision making technique and appropriate consultation with those affected by the problem, to identify the best option
3　Plan how you will implement the solution	3.1　Construct a detailed plan for implementing the solution, including any resource requirements 3.2　Outline how the solution will be communicated to those affected by it

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to make effective decisions to solve problems in the workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C2, C5, C6, F6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	16

Additional Guidance about the Unit
Indicative Content:

1	- Ways to recognise, investigate and analyse complex problems - Brainstorming and a range of other creative thinking techniques - Setting objectives in relation to problems
2	- Gathering information and generating alternatives - Problem solving techniques - Setting priorities - Evaluating options - Conditions under which decisions are made (certainty, uncertainly) - Decision making models and techniques - Types of decisions (routine, adaptive, innovative etc) - Decision making in relation to goals which specify the quality or quantity of the desired results - Methods of and reasons for consultation
3	- Planning (for example – human resources, finance, marketing, operations, health and safety) - Resource allocation (money, people, facilities, equipment etc)

Title:	Delegating authority in the workplace (M4.09)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Delegate a task in the workplace	1.1 Agree and set objectives for the task to be delegated 1.2 Estimate the time required to complete the task 1.3 Explain how progress will be monitored 1.4 Set guidelines for resource availability and utilisation 1.5 Assess the authority required for the person to whom they are delegating 1.6 Specify the standards to be adhered to
2 Examine ways to improve their ability to delegate and empower others	2.1 Review how well they delegated the task, based on the outcomes of the delegated tasks and feedback from others 2.2 Explain how they can improve their ability to delegate and empower others

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to effectively delegate work and empower others.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B6, D5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	5

Additional Guidance about the Unit
Indicative Content:

1	- Advantages and disadvantages of delegation - Principles of effective delegation - Delegating to empower others - Constraints and benefits of empowerment - Techniques for deciding the most appropriate individual to undertake the activity - The importance of making effective and efficient use of people's knowledge and skills, and how to achieve this - Definitions of authority and power, responsibility and accountability - Process of delegation including barriers and support mechanisms - Techniques to monitor outcomes of delegation - Feedback, recognition and reward techniques
2	- Review of own effectiveness in delegating tasks - Identifying actions that could improve ability to delegate

Title:	Managing and implementing change in the workplace (M4.10)
Level:	4
Credit value:	7

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the forces for change in an organisation	1.1 Examine the forces that may require own organisation to change by conducting an environmental and organisational analysis
2 Know how to manage and implement change in the workplace	2.1 Give an example of a change required in the workplace, arising from the environmental and organisational analysis 2.2 Investigate the change required to determine whether it is feasible and viable for implementation 2.3 Analyse the benefits and implication of the change for stakeholders 2.4 Explain how they will obtain support from stakeholders for the change 2.5 Compile a detailed implementation plan

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to manage and implement change in the workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C4, C5, C6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	28
Additional Guidance about the Unit	

	Indicative Content:
1	- Environmental analysis technique, such as PESTLE - Organisational analysis, such as SWOT analysis
2	- Benefits and implications of change - Methods of assessing risks and uncertainties - Principles of change management - System theory and process design - Methods for planning for change - Feasibility and viability of the change for stakeholders - Use of tools for planning change - Human and financial factors in the consideration of change - Clear communication of change - The importance of involving people to facilitate effective change

Title:	Developing and managing people in the workplace (M4.11)
Level:	4
Credit value:	5

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Analyse the needs and expectation of people in the workplace	1.1 Examine the expectations and requirements of groups and individuals in the workplace 1.2 Examine the training and development needs of individuals and groups in the workplace to improve work performance
2 Develop individuals in the workplace to improve performance	2.1 Explain how to accommodate the expectations and individual requirements of individuals in the workplace 2.2 Examine development vehicles in the organisation to accommodate the development needs of individuals in the workplace 2.3 Provide a development plan to enable the identified development needs to be progressed and met

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to understand the needs and expectations of people in the workplace and to enable them to develop individuals to improve organisational performance.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: A2, D7, D9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	20

Additional Guidance about the Unit
Indicative Content:

1	• Examining the expectations and requirements of people • Determining groups and individuals for whom the manager has responsibility • Diversity in the workplace • Understanding the causes of conflict in the organisation • Ways of identifying substance abuse and related problems • Promotion of work/life balance
2	• Administering people in accordance with guidelines and career pathways • Being aware of and understanding organisational policies (diversity, substance abuse etc) • Understanding the variety of documentation required to manage people • Managing career development of people • Support structures within the organisation • Techniques for managing interpersonal conflict • Techniques for informal performance assessment and formal appraisal • Methods of ensuring fair and objective assessment/appraisal • Methods to monitor, evaluate and record individual feedback • Reporting performance appraisal including the importance of confidentiality • Promotion of a healthy life-style • Learning styles and the range of training/development opportunities available • Mechanisms to provide appropriate feedback to individuals • Career development strategies • Appropriate recording systems

Title:	Understanding the organisational culture and context (M4.12)
Level:	4
Credit value:	6

Learning outcomes (the learner <u>will</u>)	Assessment criteria (the learner <u>can</u>)
1 Understand the culture and context of the organisation	1.1 Examine the organisation within its broader environment using appropriate environmental and organisational analysis techniques 1.2 Appraise the purpose, policy and procedures within which the organisation is required to function 1.3 Investigate and explain the culture and ethical behaviour required in the organisation
2 Examine own ability to function within organisational culture and ethical norms	2.1 Examine and explain their own ability to function within organisational culture and ethical norms 2.2 Propose how they can uphold the ethical standards of their organisation

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to understand the needs and expectations of people in the workplace and to enable them to develop individuals to improve organisational performance.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	26

Additional Guidance about the Unit
Indicative Content:

1	- Impact of external forces on the organisation (for example political, social, economic, technological, legal, environmental) and related environmental and organisational analysis techniques (e.g. PESTLE and SWOT analysis) - Law and policies governing the organisation - The nature and purpose of organisations - Formal and informal relationships between departments and people - Legal duties in relation to sex, race, age, disability and unfair discrimination - Organisational culture, ethos and values - Corporate social and environmental responsibility - Organisation policies/guidelines governing behaviour
2	- Personal SWOT analysis - Organisation's role and objectives - Personal ethical standards, values and beliefs - Barriers to effective functioning in the organisation and ways to overcome these - Available support mechanisms

Title:	Communicating effectively orally and in writing in the workplace (M4.13)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Plan and deliver an effective presentation	1.1 Specify the aim and objectives of the presentation and the intended audience 1.2 Research, analyse and select information for inclusion in the content 1.3 Plan the content of the presentation and prepare relevant visual aids 1.4 Deliver the presentation to identified personnel ensuring that the information is logical, clear and accurate 1.5 Respond to questions about their presentation
2 Conduct an interview in the workplace	2.1 Plan a formal interview in the workplace 2.2 Formulate appropriate questions to elicit desired information 2.3 Keep appropriate records of the interview 2.4 Review own interviewing performance
3 Effectively communicate in writing in the workplace	3.1 Gather, analyse and collate information and use this to correspond in writing, using various formats 3.2 Collect feedback on own written communication performance 3.3 Identify ways to improve their written communication ability and skills

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to communicate effectively orally and in writing in the workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: E11
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the	Institute of Leadership & Management

unit	
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	4

Additional Guidance about the Unit

Indicative Content:

1	• Objectives, audience and contexts in relation to presentation • Researching and logically grouping information • Arranging information in a coherent ways with a beginning, middle and end • Knowing the difference between fact and opinion • The importance of conveying accurate information • Knowing how to effectively use presentation aids • Tone, language and level of formality • Techniques for effective and confident delivery • Techniques for controlling and responding to questions
2	• Nature and purpose of workplace interviews • Planning workplace interviews • Questioning skills and techniques for use in interviews • Types of questions, their purpose and structure • Record keeping, purpose and techniques • Techniques for reflection and review of own performance
3	• Value of the written word and the importance of clear objectives • Various formats for written communication used within the organisation • Techniques for identifying relevant content • Effectively gathering and analysing information • Referencing • Development of bibliographies • Tone, language and level of formality • Image, structure, layout conventions including "house styles" • Inclusion of visual material (tables, graphs etc) and appendices

Title:	Understanding work in contemporary society (M4.16)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the nature and purpose of their organisation	1.1 Examine and describe the nature and purpose of own organisation 1.2 Assess the strengths and weaknesses of organisational type in enabling it to achieve its goals
2 Understand their organisational structure	2.1 Investigate and explain own organisational structure 2.2 Assess the strengths and weaknesses of organisational structure in enabling it to achieve its goals
3 Understand the potential impact of the external environment on the organisation	3.1 Evaluate changes in the external operating environment that may have an effect on the way the organisation operates 3.2 Make recommendations for changes that may be required to respond to these external factors

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to understand work in contemporary society.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	8

Additional Guidance about the Unit
Indicative Content:

1	- Nature and purpose of organisations - Organisations and power - Advantages and disadvantages of organisational type (nature and purpose)
2	- Theories and debates about work and organisations - Various organisational models/structures/formats - Advantages and disadvantages of various organisational models
3	- Changes in the nature of work organisations as a result of technological, competitive and social development - Availability of information - Learning organisations and the role of professionals - Gender, diversity, demographic trends, work and employment - Globalisation - Possible ways of responding to external factors that have an influence on organisations

Title:	Understanding entrepreneurship (M4.17)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the factors that encourage entrepreneurial behaviour	1.1 Explore the possible nature, character and motivation of an entrepreneur 1.2 Determine the political, social and economic factors that encourage or inhibit enterprise
2 Explore how enterprise can be financed and marketed	2.1 Explore how a new enterprise can be developed 2.2 Investigate various options available to finance and market a new enterprise 2.3 Explain how to manage and sustain the growth of a new enterprise

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to explore and understand enterprise; and how it can be financed and marketed.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit
Indicative Content:

1	• Entrepreneur, entrepreneurship and the management of an enterprise • Possible nature, character and motivation of an entrepreneur • Political, social and economic factors that encourage or inhibit enterprise • Case studies of successful and unsuccessful entrepreneurs
2	• Defining enterprise development • Insights on researching and developing new ideas • Appreciation of various legal forms of enterprise available • Financing new venture including cost estimation and various sources of finance • Resources required for business • Construction of Business Plans • Reasons for business failing • Aspects of marketing (networking, word of mouth, personal selling, family business etc)

Title:	Understanding accounting for management control (M4.18)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand costing system in own organisation	1.1 Examine, describe and explain costing system(s) used in own organisation
2 Understand the role that budgetary control plays in the management of the organisation	2.1 Examine and explain how budget plans are devised and controlled in the organisation 2.2 Examine and describe the actions individual managers take to ensure that they adhere to the budgets in their sphere of control
3 Understand financial decision-making in own organisation	3.1 Examine and explain the method(s) of investment appraisal used in own organisation 3.2 Explain the techniques used in the evaluation of supply chain decisions (such as make/buy decisions) 3.3 Interpret and explain how other strategic or non-financial factors may influence investment or supply chain decisions

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to explore and understand accounting for management control.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: E1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit
Indicative Content:

1	- Costing systems - Methods of costing - Marginal costing - Absorption costing
2	- Budgeting as a concept - Budget planning and control systems
3	- Methods of investment appraisal - Appropriate techniques to support business decisions - Other aspects affecting business decisions

Title:	Understanding and interpreting financial data (M4.19)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the range of financial documents which can be used by the organisation's stakeholders to judge performance	1.1 Identify the organisation's stakeholders and explain their various expectations 1.2 Explain the various financial documents produced by the organisation and the information which they provide
2 Know how to calculate and interpret a range of performance indicators based on financial information	2.1 Identify, explain and calculate relevant performance indicators (PIs) based on the organisation's financial documents 2.2 Interpret these PIs to provide an assessment of the organisation's performance in a way relevant to each of its stakeholders

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to understand and interpret financial information.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: E2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit	
Indicative Content:	
1	• Range of stakeholders and their various expectations of the organisation • Balance sheets, profit and loss accounts, income and expenditure accounts (for non-profit organisations)
2	• Performance indicators and their role in achieving objectives • Financial information and its value for management • Ratio analysis • Financial measure of organisational performance – interpretation of information

Title:	Understanding the importance of marketing for an organisation (M4.20)
Level:	4
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Examine the market within which an organisation operates	1.1 Explore the market within which own organisation operates, focussing on market size, the organisation's share of that market and its competitor profile 1.2 Examine and explain the role of the marketing function and activities within own organisation
2 Evaluate the effectiveness of marketing within own organisation	2.1 Evaluate the effectiveness of marketing within own organisation and where necessary make recommendations for improvement

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to explore and understand the importance of marketing for their organisation.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C2, F9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	6

Additional Guidance about the Unit
Indicative Content:

1	- Concepts and key ideas of marketing (for example: segmentation, targeting, positioning, buyer behaviour etc) - Market scanning and analysis techniques (for example: BCG Matrix etc) - Marketing mix - Concept of "product" - Range of different activities carried out by marketing
2	- Marketing mix - Buyer/service user behaviour

Title:	Using quantitative methods to solve management problems (M4.21)
Level:	4
Credit value:	5

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to collect and analyse data using quantitative methods	1.1 Identify and describe a management problem/issue in own organisation 1.2 Research the problem/issue using relevant method(s) to collect quantitative data 1.3 Use quantitative methods to analyse the data 1.4 Draw conclusions from the findings of the data analysis

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to collect and analyse data using quantitative methods to solve management problems.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	10

Additional Guidance about the Unit
Indicative Content:

1	- The use of a calculator and spreadsheet software (Excel) - Tabulation charts and graphs - Developing questions in quantitative research - Issue of validity and reliability - Methods of collecting data from numerous sources - Random and non-random methods of sampling - Normal distribution, measures of central tendency (mean, median, mode) and dispersion (range, standard deviation)

Title:	Understanding the economics of the marketplace (M4.22)
Level:	4
Credit value:	6

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Use economic principles to explain how prices are determined in an organisation's market	1.1 Use micro-economic principles to analyse the factors affecting the prices of goods or services in a market in which the organisation operates, and the impact this has on the organisation's financial performance 1.2 Assess the responsiveness of consumers and suppliers to price changes in the organisation's own or a related market
2 Use economic principles to explain the impact of competition on an organisation's market	2.1 Identify the current barriers to entry and exit from the market in which the organisation operates, for new and existing suppliers 2.2 Assess the competitive environment in which the organisation operates and explain the implications this has for prices and financial performance 2.3 Assess how potential economic, political, social and technological developments will affect barriers to entry and exit to the market for new and existing suppliers, and the likely impact this may have on prices and financial performance

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to understand the economics of the marketplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008

Unit guided learning hours	10

Additional Guidance about the Unit	
Indicative Content:	IQual
1	- Economic principles and determinates of supply and demand - Use of demand and supply curves to illustrate price equilibrium - Increases and decreases in supply and demand, and their impact on equilibrium price - Concept, types, determinates and implications of elasticity of supply and demand - Industrial (Business to Business) and consumer (Business to Consumer) markets and the implications of consumer price and income elasticity on markets further up the supply chain
2	- Models of market competition (perfect and imperfect competition, monopoly and oligopoly) and their impact on price and financial performance - The nature and impact of barriers to entry and exit to the market for new suppliers - Likely economic, political, social and technological developments and their potential impact on the market

Title:	Forecasting using quantitative methods (M4.23)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to forecast using quantitative methods to deal with a potential future scenario in own organisation	1.1 Develop a forecast for a relevant aspect of own organisation's activities using quantitative forecasting methods 1.2 Propose an appropriate plan to deal with potential future scenario

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to forecast using quantitative methods.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	8

Additional Guidance about the Unit
Indicative Content:

1	• Use of spreadsheets • Basic steps in forecasting (defining the problem/situation/aspect, choosing the data, analysing data patterns, choosing a model, calculating a forecast, evaluating accuracy of forecast) • Data (time series, historical data) • Visual and numerical data analysis • Use of forecasting methods (for example planning resources, personnel, finance etc) • Where and how to use basic quantitative forecasting techniques • Forecasting (moving average, trend analysis, regression analysis) • Variations (up or down trends, seasonality, cycles, irregular variations, random variations)

Title:	Developing your leadership styles (M4.24)
Level:	4
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand what the outcome of leadership is	1.1 Examine the importance of performance and engagement with followers in an organisation
2 Assess own leadership styles	2.1 Examine the six specific scales for leadership 2.2 Assess the effectiveness of own leadership styles in terms of the six scales
3 Understand the implications of own leadership styles for self and for leadership within own organisation	3.1 Using the results of own leadership style effectiveness examine the implications for self and own organisation 3.2 Examine the impact of changes in the situation on the effectiveness of the adopted style
4 Assess own leadership behaviour in terms of the three global factors which determine effective leadership	4.1 Examine the three global factors in terms of leadership effectiveness 4.2 Assess own leadership behaviour in terms of the three global factors
5 Examine how they can develop own leadership style and effectiveness	5.1 Produce an action plan to develop own leadership style and effectiveness 5.2 Explain the benefits of implementing the action plan 5.3 Explain how you will monitor and evaluate the action plan
Additional information about the unit	This is an optional unit and uses the Integrated Leadership Style Measure (ILM72). Centres choosing this unit should contact AQR Ltd directly at ilm@aqr.co.uk or on telephone number 01244 572050 to arrange access for their candidates to this measure and to obtain the cost of using this per candidate. This would be a direct arrangement between AQR Ltd and the Centre wishing to obtain access to the ILM 72 instrument for their candidates.
Unit purpose and aim(s)	To develop own leadership style to improve own and organisational performance.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: A2

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	10

	Additional Guidance about the Unit
	Indicative Content:
1	• Definition of leadership • The difference between leadership and management • Importance of performance and interaction (engagement) with followers in an organisation

2	• Influential leadership models
	• Great person models
	• Trait theories (intelligence, personality etc)
	• Behavioural models (Pull Theory, Transactional Models, Transformational Models, Action Centred Leadership, The 7 Habits etc)
	• Situational Models (Hersey-Blanchard, Tannenbaum-Schmidt etc)
	• ILM 72 (Integrated leadership measure)
	• Situational leadership
	• Six specific scales to measure aspects of leadership style:
	  ▪ task vs. person
	  ▪ flexible vs. dogmatic
	  ▪ de-centralised vs. centralised
	  ▪ reward vs. punishment
	  ▪ the means vs. the end
	  ▪ structured vs. organic

3	• Ability to assess and understand various situations • Implications of leadership styles for self and for organisational performance (productivity, open to ideas and suggestions, effective delegation, developing people and processes etc) • Implications for different situations
4	• Three global scales • Determination to deliver • Individual cohesion • Team working • Assessing own leadership behaviour in terms of the three global scales • Understanding how these work in terms of motivation theory
5	• Compiling an action plan (current behaviours, goal setting, implementation practice, identification of what the difference in performance would be) • Benefits of implementing an action plan

Title:	Developing individual mental toughness (M4.25)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the importance and implications of mental toughness	1.1 Examine the importance and implications of mental toughness
2 Be able to assess own mental toughness	2.1 Examine a model that measures mental toughness 2.2 Assess own mental toughness using a relevant model
3 Understand the implications of own mental toughness in terms of personal effectiveness and effectiveness within the organisation	3.1 Using the results of own mental toughness assessment, examine the implications for self and organisation
4 Understand how mental toughness can be developed	4.1 Examine how mental toughness development can be achieved 4.2 Examine tools for developing mental toughness
5 Examine how they can develop own mental toughness	5.1 Compile an action plan to develop own mental toughness 5.2 Explain the benefits of implementing the action plan 5.3 Explain how you will monitor and evaluate the action plan
Additional information about the unit	This is an optional unit and uses the MTQ48 (measures Mental Toughness). Centres choosing this unit should contact AQR Ltd directly at ilm@aqr.co.uk or on telephone number 01244 572050 to arrange access for their candidates to this measure and to obtain the cost of using this per candidate. This would be a direct arrangement between AQR Ltd and the Centre wishing to obtain access to the MTQ48 instrument for their candidates.
Unit purpose and aim(s)	To develop individual mental toughness.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: A2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	

Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	5

Additional Guidance about the Unit

Indicative Content:

1	- Importance and implications of mental toughness - Where mental toughness makes a difference – performance, wellbeing, positive behaviours and aspiration
2	MTQ48 (Model that measures control, challenge, commitment, confidence)
3	- Benefits (Work to demanding goals and target, handle several things at once, respond to sudden change and demand, achieve despite set backs and interruptions) - Consequences (under-performance, stress related problems etc)
4	- Developing attentional control - Developing anxiety control - Developing positive thinking and visualisation - Effective goals setting
5	- Developing an action plan (current behaviours, goal setting, implementation - practice, identification of what the difference in performance would be) - Monitoring and evaluation - Benefits of implementing an action plan

Title:	Understanding the macro economic environment (M4.26)
Level:	4
Credit value:	7

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Assess the impact of the domestic economic environment on the organisation	1.1 Assess the impact of the current domestic economic environment on the organisation 1.2 Assess the likely impact of current fiscal and monetary policy on the domestic economic environment and its implications for the organisation in the short to medium term
2 Assess the impact of the international economic environment on the organisation	2.1 Assess the impact of the current international economic environment on the organisation and its implications for the short to medium term

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of the macro economic environment.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/07/2008
Unit guided learning hours	25

Additional Guidance about the Unit
Indicative Content:

1	• Macro-economic theory and indicators of macro-economic conditions (national income and determinates of economic performance and growth; inflation and its causes, etc) • Government interventions in the economy (fiscal and monetary policy; role of a country's Central Bank and interest rates)
2	• International trade, exchange rates, terms of trade and their impact on international trade • Trends in the pattern of international trade; globalisation and the effect of international treaty obligations [such as the European Union (EU), Association of SE Asian Nations (ASEAN) etc World Trade Organisation etc] on international trade

Title:	Communication in management (M4.27)
Level:	4
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand communication theories, concepts and practises	1.1 Explain communication theories, concepts and practises 1.2 Explain the importance of effective communication for a middle manager
2 Communicate effectively in writing	2.1 Communicate information in a range of appropriate written business formats using the appropriate tone, language and level of formality 2.2 Select appropriate criteria to evaluate own ability to communicate effectively in writing 2.3 Collect feedback on own written communication performance 2.4 Identify own strengths, weaknesses and areas for improvement in communication

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of communication as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: A3, B6, C2, D2, D3, D6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit
Indicative Content:

1	- Communication theories, including the communication cycle and overcoming barriers - Different types of communication, including oral, written, visual and electronic and their relative advantages and disadvantages - Non-verbal communication – body language and facial expression - Business language – including tone, style and vocabulary - Need for feedback, and implications of no feedback
2	- Value of the written word and the importance of objectives and the reader(s) - Letters, memos, reports, e-mails or other forms of written communication in use within the organisation - Planning for writing, including use of available information and the needs of the recipient - Tone, language, level of formality - Image, structure, layout conventions including "house styles" - Inclusion of statistical/visual materials and appendices in reports

Title:	Understanding financial management (M4.28)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand finance within the context of an organisation	1.1 Explain the use of source documents in accounting 1.2 Identify the organisation's sources of finance or funding 1.3 Explain the purposes of the main financial documents used within the organisation 1.4 Explain the importance of cash flow forecasting and cash flow management to the organisation 1.5 Provide a general assessment of business/organisational performance using appropriate financial measures
2 Understand the value of management accounting	2.1 Explain the role of the management accountant as the provider of management information 2.2 Analyse the range of stakeholders and explain their various expectations of the organisation 2.3 Explain the role of performance indicators in monitoring the achievement of objectives
3 Understand budgets for the management of own area of operation	3.1 Explain the process of budget setting used in the organisation 3.2 Explain how to use budgetary techniques to contribute to controlling cost in own area of operation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of finance within the context of an organisation as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: E2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management

Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit

Indicative Content:

1	- Financial information and its value for management and decision-making - Balance Sheet, Profit & Loss Account - Income & Expenditure Accounts (for non-profit organisations) - Financial measures of business/organisational performance – calculation and interpretation of Accounting Ratios - Cash, profit and cash flow forecasting and credit control - Sources of finance/funding and their characteristics - Source documents in accounting (invoices, etc)
2	- Role of the management accountant – as provider of management information - Range of stakeholders and their various expectations of the organisation - Performance indicators and their role in achieving objectives
3	- Nature and purpose of financial and non-financial budgets - Methods of preparing budgets - Budgetary techniques for controlling operations - How variances are calculated and used to analyse extent, source and cause of budgetary deviation - Techniques for monitoring and controlling costs

Title:	Managing a healthy and safe environment (M4.29)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand how to manage a healthy and safe environment	1.1 Critically review own organisation's health and safety policy and procedures and make recommendations for improvements 1.2 Conduct a risk assessment in own area of operation 1.3 Explain the actions required to ensure the health, safety and welfare of people in own area of operation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing a healthy and safe environment as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B8, B10, B11, E6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	9

Additional Guidance about the Unit
Indicative Content:

1	In relation to the laws and practices operating in the candidate's country of employment and his/her employer's regulations: • Health and safety law, civil claims, negligence, relevant Health and Safety legislation, role and powers of any Health and safety regulatory body • Workplace (Health Safety and Welfare) Regulations • Organising risk assessment procedures, identifying prevention and control measures • Accident causation, immediate and root causes, investigating accidents and incidents, producing reports. Recommending prevention and control measures • Costs of accidents at work, effects on people and productivity • Monitoring health and safety performance, inspection, audits, sampling, safety tours and use of accident statistics • Employee consultation systems in place e.g. Safety Representatives and Safety Committees Regulations, Health and Safety Consultation with Employees Regulations • Environmental protection legislation, reusing, reducing and recycling resources, sustainable activities, waste disposal duties

Title:	Managing meetings (M4.30)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the purpose of and preparation required prior to a meeting	1.1 Explain the different types and purposes of meetings in the organisation and justify situations when these different types of meetings would be appropriate 1.2 Explain how a manager should prepare effectively prior to a meeting 1.3 Explain the importance of listening and other interpersonal skills
2 Chair/lead a meeting within an organisation	2.1 Set objectives for and plan a meeting in the organisation 2.2 Chair/lead a meeting adhering to meeting terminology, protocol and procedures
3 Develop a negotiation strategy in an organisation	3.1 Develop a negotiation strategy, tactics and behaviour in relation to an objective in the organisation where negotiation is required to achieve a "win-win" relationship

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing meetings as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: D2, D6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007

Unit guided learning hours	15

Additional Guidance about the Unit

Indicative Content:	IQual

1	- Situations when meetings are/are not appropriate - Different types and purposes of meetings (including formal/informal, decision-making, informing, instructing, negotiating) - Measures to prepare effectively including consultation, reference to documents and other evidence; preparation of papers/presentations - Importance of listening and other interpersonal skills - Methods of ensuring actions are completed as required by the meeting
2	- Role and responsibilities of chairperson/leader in relation to formal and informal meetings - Setting the objectives for a meeting - Methods of planning a meeting to achieve particular outcomes (including participants, objective agendas, format and location) - Meetings documents, terminology and protocol - Ways to encourage contributions, and control digression and conflict to ensure outcomes are achieved within timescale and authority - Nature, purpose, style and format of minutes or other records
3	- The importance of defining objectives, and deciding whether negotiation is the appropriate measure to take - Formal and informal negotiation - Ways to identify acceptable outcomes, from the ideal to least acceptable, and their consequences - Techniques for influencing others, including non-verbal communication and social skills - Assertiveness - Levels of power and authority, and the impact on negotiation - Negotiation strategy, tactics and behaviour - Conflict and its resolution - Value systems and other barriers to acceptance - The importance of achieving "win-win" and its effects on long term relationships

Title:	Managing marketing (M4.31)
Level:	4
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Analyse the effectiveness of product and service management in an organisation	1.1 Analyse the effectiveness of product and service management within the organisation and make recommendations for improving the effectiveness of product and service management
2 Analyse the effectiveness or marketing and selling in an organisation	2.1 Analyse the effectiveness of marketing and selling within the organisation and make recommendations for improving marketing and selling within the organisation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of marketing management as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: C2, F9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	15

Additional Guidance about the Unit
Indicative Content:

1	- Concepts of "product" across all sectors and organisations - Application of the concept of product life cycles - Stages in bringing new or improved products or services to the market - Ways to test market reaction and operational feasibility by use of prototypes and pilots - Patents and copyright, and their application to own organisation where relevant
2	- Concepts of marketing and selling - The marketing mix - Range of marketing tools and activities, including market research and segmentation, advertising, promotion and publicity, public relations - Range of sales techniques and sales management

Title:	Analysing and presenting data to inform management decisions (M4.32)
Level:	4
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Use spreadsheets to analyse and present numerical data	1.1 Gather and analyse raw data about the organisation using spreadsheets 1.2 Create tables, graphs and charts to present data they have gathered and analysed

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of analysing and presenting data as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	10

Additional Guidance about the Unit
Indicative Content:

| 1 | Published statistics – government and other sources; including use of internet Tables, mean, median and mode, and frequency distributions Charts and diagrams – construction and use Range of applications of spreadsheets for management Creation of spreadsheets, including calculations and graphical presentation |

Title:	Managing stress and conflict in the organisation (M5.08)
Level:	5
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Evaluate the effectiveness of the organisation and of self in recognising workplace stress and in providing the necessary support	1.1 Evaluate the effectiveness of the organisation in recognising workplace stress and providing the necessary support mechanisms 1.2 Analyse own ability to provide the necessary support using organisational mechanisms
2 Evaluate the effectiveness of the organisation and of self in recognising people problems and addressing them	2.1 Evaluate the effectiveness of the organisation in recognising and addressing people problems 2.2 Evaluate own ability to recognise people problems and address them

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing individuals as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: B6, D6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	14

Additional Guidance about the Unit
Indicative Content:

1	- Causes and effects of stress; implications workplace and non-work activities/relationships - Symptoms of stress in self; recognition of stressful situations - Setting objectives and determining priorities to balance personal and organisational needs - Time management techniques as major factor - Benefits of delegating - The place of alternative stress reduction therapies - Sources of support, and when to seek professional advice/counselling - Role of assertiveness in stress management - Active planning for stress management
2	- Causes of conflict and interpersonal friction (including bullying and harassment) and ways to resolve them - Causes, symptoms and impacts of stress and the implications/effects of stress for individuals and organisations - Management responsibilities in relation to work-related stress - Methods to manage stress at work, sources of support and techniques to counsel staff - Grievance and discipline procedures, including supporting records - Organisational employment policies, (e.g. relating to time-keeping, absenteeism, conduct, level of performance, attitude and behaviour, gross misconduct) - Awareness of legal aspects of disciplinary processes

Title:	Managing resources (M5.17)
Level:	5
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand how to manage resources in own area of operation	1.1 Analyse how to ensure the provision of; the effective, efficient and safe use of, the maintenance of and the security of resources in own area of operation in the organisation 1.2 Examine ways of minimising physical waste in own area of operation in the organisation

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing resources as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS: F3
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit
Indicative Content:

1	- Implications of equipment usage – acquisition and operating costs, lean management - Methods of capacity planning - Routine scheduled maintenance programmes - Measures to ensure the safety and security of equipment - Measures for the safe operation of equipment, including training - Methods of determining materials requirements, including MRP and JIT - Purchasing/procurement procedures - Materials control principles and procedures, including EBQ and EOQ - Procedures for recording receipt and issue of materials - Materials storage, including safety and security - Incidents of waste and measures to minimise it

Title:	Conducting operations research (M6.07)
Level:	6
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Conduct operational research in an organisation	1.1 Conduct operational research in the organisation using relevant and appropriate operational research techniques 1.2 Make recommendations for improvements based on findings

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of operational research techniques as required by a practising or potential middle manager.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2004 NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Private
Units available from	01/10/2007
Unit guided learning hours	10

Additional Guidance about the Unit
Indicative Content:

1	- Origin and nature of operations research - Range of techniques available - In depth coverage of concepts and practice of at least <u>two</u> of the following techniques, as relevant: - Linear programming - Queuing theory - Simulation - Decision trees and decision lists

APPENDIX B

Mandatory assessment for the IQual Certificate in Middle Management

M4.01 Understanding the Management Role and
M4.02 Developing Management Skills (through research)

ASESSMENT Work Based Assignment

Centre Number	Centre Name
Candidate Registration No	**Candidate Name**

TASK

This task consists of three sections as follows:
- The first section is about understanding the way your organisation works and the management role in your organisation
- The second section is undertaking research regarding a management issue in your organisation. This should be something that is a problem area or an opportunity for improvement. In order to identify a relevant issue and clarify its focus, you should discuss your topic with your tutor, manager, work colleagues and/or fellow candidates before you undertake the research.
- The third section is explaining your research and presenting your findings to a group to test whether your findings are meaningful in terms of the issue that you researched.
- The fourth section is a review of the research activity and identifying areas for improvement

The word count for this task should be between 2500 and 4000 words.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Section 1 - Understanding the management role in your organisation This section is about developing your knowledge and understanding of the way your organisation works and the role of the manager in this organisation. To do this you are required to: • Describe your organisation's purpose and its stakeholders to provide the context for your assignment. • Explain your organisation's structure, functional areas and managerial roles. • Describe middle managers' responsibilities in achieving the organisation's goals. • Explain, using appropriate examples, how relationships in your workplace and the ability to communicate can affect managerial performance. • Identify barriers to communication and effective interpersonal relationships in your organisation and devise strategies to overcome these. *Note: You could include a diagram or chart as an appendix to your document to facilitate understanding of your organisation's structure* Now that you have looked at your organisation and the role of its managers, you are required to assess your personal ability as a manager and identify areas for further development. To do this you are required to: • Critically assess your own knowledge, skills, personal attributes and behaviour. • Identify areas for personal development to improve your managerial behaviour and actions. • Plan and set priorities for your future development. *(min 10 marks required from 30 available)*	• The organisation's purpose and its stakeholders are described • The organisation's structure, functional areas and managerial roles are explained • The specific responsibilities of middle managers' in enabling the organisation to achieve its goals is described • The effect of interpersonal relationships and communication skills on managerial performance is explained • The barriers to communications and effective interpersonal relationships in the organisation are identified and strategies devised to overcome these • Own knowledge, skills, personal attributes and behaviour and their effect on own managerial ability is critically assessed • Areas for personal development to improve own managerial behaviour are identified • Priorities are planned and set for future development

Section 2 - Undertake a research activity within your organisation In conjunction with your line manager or tutor, identify a management issue in your organisation that is a problem area or an opportunity for improvement. You will need to clearly explain the scope and impact of this issue before commencing your research and briefly describe your research methodology You are required to gather secondary data from a wide range of sources. Check that your data is valid (from a reliable source and accurate) and relevant to the issue that you are researching. Analyse the data, make deductions and draw appropriate conclusions. Ensure that you reference your sources appropriately. *(min 13 marks required from 40 available)*	• A research topic relevant to the organisation is identified and agreed with the manager and/or tutor • The research methodology is briefly described • Secondary data is gathered from a wide range of academic, official and commercial sources in both print and electronic media • Information is analysed to judge its relevance and validity and deductions are made and conclusions drawn • The sources are acknowledged
Section 3 - Lead a group discussion about your research findings Lead a group discussion, briefly explaining your findings to the group. (Keep notes of your input and comments from others and attach these to your assignment.) *Notes:* • *The discussion can be fairly informal. The reason for the discussion is to test the validity of your findings* • *The group should be big enough to facilitate discussion/debate, but small enough to be efficient in terms of the use of time* *(min 5 marks required from 15 available)*	• Findings are presented and a group/seminar discussion is led about the research and the outcomes of the discussion briefly summarised • Participated actively in a group discussion

Section 4 – Review
 	
Review how well you planned and conducted the research activity and identify areas for improvement
 	
Note: Things you should consider here are:
    o *What worked well*
    o *What did not work well*
    o *What could you do differently next time*
 	
(min 5 marks required from 15 available)
	• Reviewed how well they planned and conducted the research activity and identified areas for improvement

By submitting I confirm that this assessment is my own work Signed Date	

MARK SHEET: WORK BASED ASSIGNMENT (M4.01 and M4.02)

Centre Number	Centre Name		
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:		

Criteria	WBA Strengths	WBA Weaknesses	Assr mark	QA mark
Section 1 - Understanding the management role in your organisation • The organisation's purpose and its stakeholders are described • The organisation's structure, functional areas and managerial roles are explained • The specific responsibilities of middle managers' in enabling the organisation to achieve its goals is described • The effect of interpersonal relationships and communication skills on managerial performance is explained • The barriers to communications and effective interpersonal relationships in the organisation are identified and strategies devised to overcome these • Own knowledge, skills, personal attributes and behaviour and their effect on own managerial ability is critically assessed • Areas for personal development to improve own managerial behaviour are identified • Priorities are planned and set for future development			/ 30 marks (min10)	

Section 2 - Undertake a research activity within your organisation • A research topic relevant to the organisation is identified and agreed with the manager and/or tutor • The research methodology is briefly described • Secondary data is gathered from a wide range of academic, official and commercial sources in both print and electronic media • Information is analysed to judge its relevance and validity and deductions are made and conclusions drawn • The sources are acknowledged		/ 40 marks (min 13)	
Section 3 - Lead a group discussion about your research findings • Findings are presented and a group/seminar discussion is led about the research and the outcomes of the discussion briefly summarised • Participated actively in a group discussion		/ 15 marks (min 5)	
Section 4 – Review • Reviewed how well they planned and conducted the research activity and identified areas for improvement		/ 15 marks (min 5	

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 50+ overall, AND minimum in each section	**PASS FAIL**	Total 50+ overall, AND minimum in each section	**PASS FAIL**
Section fail if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

APPENDIX C

Suggested outline assessments for optional units for IQual Certificate in Middle Management

Assessments in a ready to use format are available to purchase from ILM Customer Services

M3.10	Introduction to leadership

Reflective Review

Identify factors at work that will influence your choice of leadership styles and explain why your leadership styles are likely to positively affect your team

Assess your own leadership behaviours and potential by referring to a relevant leadership model, your organisation's working practices, and by collecting feedback from others. Describe what actions you could take to improve as a leader

Assessment Criteria

- The factors that will influence your choice of leadership styles or behaviours in workplace situations is identified
- The reason why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour is explained
- Own leadership behaviours and potential assessed in the context of a particular leadership model and organisation's working practices and culture using feedback from others
- Appropriate actions to enhance own leadership behaviour in the context of a particular leadership model is described

M3.15	Managing stress in the workplace

Reflective Review

Identify a situation at work where you or a colleague has felt under stress. Explain what caused this stress and examine its impact on your workplace

Note: If neither you nor a colleague has experienced any stress, you may choose to use the experience of a friend or relation who has experienced stress at work, or you may explain the general causes and impact of stress in organisations

Describe how you would recognise stress in yourself and in other members of your team and explain one practical stress management technique that you could use to overcome this stress in yourself or in your team

Outline the responsibilities your organisation's management has in relation to work related stress in your team, and explain how you could use counselling, advising or mentoring to provide support for individuals

Note: If you have had experience of using counselling, advising or mentoring, you should describe the circumstances. Otherwise, describe the conditions under which you would do so.

Assessment Criteria
- The causes and impact of stress in the organisation is examined
- The symptoms of stress in self and in others is described
- One practical stress management technique is explained
- Management responsibilities and actions in relation to work-related stress in the team are outlined
- How and when to use counselling, advising and mentoring to support individuals in the workplace is explained

M3.18	Coaching and training your work team

Work-based Assignment

This activity requires that you identify an opportunity to train and coach members of your team or other individuals in your workplace. You should:
- Describe the training and coaching need in your workplace
- Explain how you would use training and coaching to meet the need in your workplace and cater for individuals in your workplace with different learning styles
- Explain how you would use feedback to improve workplace performance in relation to this training and coaching need
- Explain how you would evaluate the effectiveness of the training and coaching techniques you have identified
- Explain how you would maintain records of the training and coaching that team members have undertaken

Assessment Criteria

- The training need is clarified
- The two training techniques appropriate to the workplace situation is explained
- How you could cater for different learning styles when training individuals in the workplace is explained
- One relevant feedback technique that could work effectively in the workplace situation is explained
- Methods of evaluating the effectiveness of training is described
- Ways of maintaining training records is explained
- The coaching need is clarified
- Planning coaching for an individual in the organisation is explained
- The importance of feedback in coaching is explained
- One method of evaluating the effectiveness of coaching is described

M3.33	Effective meetings for managers

Work-based Assignment

Describe how you would prepare prior to a meeting
Explain the following:
- The purpose of an agenda
- The role and responsibilities of the chairperson, secretary and individuals
- Basic meeting protocol and procedures
- The purpose of minutes and action plans
- How you could review your own effectiveness at meetings

Assessment Criteria

- The purpose of an agenda is explained
- How to prepare prior to a meeting is described
- The role and responsibilities of the chairperson, the secretary and individuals at a meeting is explained
- Basic meeting protocol and procedures are explained
- The purposed of minutes and action plans are explained
- Own effectiveness at meetings is reviewed

M3.34	Understanding workplace information systems

Reflective Review

Purposes of record keeping
Explain the purposes of record-keeping for your organisation
Key information
- Identify key information that should be recorded to meet your organisation's requirements and legal requirements
- Identify records which are included under relevant legislation (for example the Data Protection Act of 1998)

Storage and retrieval of information
Identify appropriate systems to store and retrieve information in your organisation
Data Access Control
Explain the need to control access to data
Electronic communication
- Identify the different uses or applications of spreadsheets and/or databases in your organisation
- Explain the value of electronic communication methods
- Explain the back-up systems for IT applications in your organisation

Assessment Criteria

- The purposes of record-keeping for the organisation are explained
- Key information that should be recorded to meet organisational and legal requirements is identified
- Appropriate systems to store and retrieve information is identified
- The need to control data access is explained
- Records which are included under relevant legislation (for example the Data Protection Act of 1998) are identified
- The different uses or applications of spreadsheets and/or databases in the organisation are identified
- The value of electronic communication methods is explained
- The back-up system for IT applications in the organisation is explained

M3.35	Marketing for Managers

Work-based Assignment

Marketing concepts – You should:
- Explain why the marketing concept is relevant for managers
- Explain your organisation's strengths, weaknesses, opportunities and threats in the marketing context
- Describe how each of the <u>four</u> elements of the marketing mix is used within the context of your organisation

Assessment Criteria

- The relevance of the marketing concept for managers is explained
- The strengths, weaknesses, opportunities and threats in the marketing context is explained
- An example of how each of the <u>four</u> elements of the marketing mix is used within the organisation is described

M4.05	Managing equality and diversity in an organisation

Reflective Review

Examine the type of culture within your organisation in relation to equality and diversity and explain the development activities necessary to implement equality and diversity actions relevant to your specific functional area. Explain how you will manage equality and diversity on an ongoing basis in your functional
Area.

Assessment Criteria

- The type of culture within the organisation in relation to equality and diversity was examined
- The development activities necessary to implement equality and diversity actions relevant to own specific functional area were explained
- How they will manage equality and diversity on an ongoing basis in own functional area was explained

M4.06	Managing risk in the workplace

Work-based Assignment

This assignment is about managing risk in the workplace. You should include the following points:
- Identify hazards and risks; and conduct a risk assessment within the context of your workplace
- Examine and explain how risk within your workplace can be minimised; and how identified risks can be continuously monitored and reviewed

Assessment Criteria

- Hazards and risks within the context of the workplace were identified
- A risk assessment within the context of the workplace was conducted
- How risk within own workplace can be minimised was examined and explained
- How any identified risks in own workplace will be continuously monitored and reviewed was explained

M4.07	Motivating people in the workplace

Reflective Review

This assignment is about motivating people to perform in the workplace. You should include the following points:
- Examine the principal factors that may affect performance and motivation in the workplace
- Analyse a theory of motivation and examine how this theory could be used to improve motivation and performance in the workplace

Assessment Criteria

- The principal factors that may affect performance and motivation in the workplace were examined
- Analysed a theory of motivation and explained how this theory could be used to improve motivation levels and performance in the workplace

M4.08	Solving problems by making effective decisions in the workplace

Work-based Assignment

Define and diagnose a complex problem in the workplace. You should include the scope and impact of the problem. Once this has been done you should:
- Search for and examine a range of solutions to the problem
- Compare and evaluate the alternative solutions using a specific decision making technique and appropriate consultation with those affected by the problems, to identify the best option
- Construct a detailed plan for implementing the solution, including any resource requirements
- Outline how you will communicate the solution to those affected by it

Assessment Criteria

- A complex problem in the workplace was defined and diagnosed including its scope and impact
- A range of alternative solutions to the problem were searched for and examined
- The alternative solutions were compared and evaluated, using a specific decision making techniques and appropriate consultation with those affected by the problem, to identify the best option
- A detailed plan was constructed for implementing the solution, including any resource requirements
- How the solution will be communicated to those affected by it was outlined

M4.09	Delegating authority in the workplace

Work-based Assignment

Within the context of your workplace agree and set objectives for a task that you could delegate. In doing this you should:
- Estimate the time required to complete the task
- Explain how you would monitor progress
- Set guidelines for resource availability and utilisation
- Assess what authority would be required for the person to whom you are delegating the task
- Specify the standards that are to be adhered to
- Review how well you delegated the task based on the outcomes of the delegated task and feedback from others
- Explain how you could improve your ability to delegate tasks and in so doing empower others

Assessment Criteria

- Agreed and set objectives for the task to be delegated
- Estimated the time required to complete the task
- Explained how progress will be monitored
- Set guidelines for resource availability and utilisation
- Assessed the authority required for the person to whom they are delegating
- Specified the standards to be adhered to
- Reviewed how well they delegated the task, based on the outcomes of the delegated tasks and feedback from others
- Explained how they can improve their ability to delegate and empower others

M4.10	Managing and implementing change in the workplace

Reflective Review

This assignment is about managing and implementing change in the workplace. You should include the following points:

- Examine the forces that may require your organisation to change by conducting an environmental and organisational analysis. Arising from your analysis given an example of a change that is required in your workplace
- Investigate the change to determine whether it is feasible and viable; and analyse the benefits and implications of this change for stakeholders. Explain how you will obtain support from stakeholders for the change
- Compile a detailed implementation plan

Assessment Criteria

- The forces that may require own organisation to change were examined by conducting an environmental and organisational analysis
- An example of a change required in the workplace was given, arising from the environmental and organisational analysis
- The change required was investigated to determine whether it is feasible and viable
- The benefits and implications of the change for stakeholders was analysed
- How they will obtain support from stakeholders for the change was explained
- A detailed implementation plan was compiled

M4.11	Developing and managing people in the workplace

Reflective Review

This assignment is about developing and managing people in the workplace. You should include the following points:

- Examine the:
    - expectations and requirements of groups and individuals in the workplace, and the
    - training and development needs of individuals and groups in the workplace that will improve work performance
- Explain how expectations and individual requirements can be accommodated in the workplace and examine the development vehicles that could accommodate the development needs of individuals in the workplace
- Provide a development plan to enable the development needs of individuals to be progressed and met

Assessment Criteria

- The expectations and requirements of groups and individuals in the workplace were examined
- The training and development needs of individuals and groups in the workplace to improve work performance was examined
- How to accommodate the expectations and individual requirements of individuals in the workplace was explained
- Development vehicles in the organisation to accommodate the development needs of individuals in the workplace was examined
- A development plan was provided to enable the identified development needs to be progressed and met

M4.12	Understanding the organisational culture and context

<u>Reflective Review</u>

Understand your organisation's culture and context by:
- Examining your organisation within its broader environment using appropriate environmental and organisational analysis techniques
- Appraising the purpose, policy and procedures within which your organisation is required to function
- Investigating and explaining the culture and ethical behaviour required in the organisation

Examine and explain your own ability to function within your organisation's culture and ethical norms; and propose how you could uphold the ethical standards of your organisation.

Assessment Criteria

- The organisation within its broader environment was examined using appropriate environmental and organisational analysis techniques
- The purpose, policy and procedures within which the organisation is required to function were appraised
- The culture and ethical behaviour required in the organisation was investigated and explained
- Their own ability to function within organisational culture and ethical norms was examined and explained
- The way that they can uphold the ethical standards of their organisation was proposed

M4.13	**Communicating effectively orally and in writing in the workplace**

Work-based Assignment

This assignment is about preparing and delivering an oral presentation, planning and conducting a formal workplace interview and corresponding in various formats. You should include the following points:

Prepare and deliver a presentation on a relevant topic in your workplace. You should:
- Specify the aim and objectives of the presentation as well as your intended audience
- Research, analyse and select information for inclusion in the content
- Plan your presentation and prepare relevant visual aids
- Deliver the presentation ensuring that the inform you convey is accurate, logical and clear
- Answer any questions about your presentation

Plan and conduct a formal interview in your workplace. You should:
- Plan your interview
- Formulate appropriate questions that will elicit the desired information
- Keep records of the interview
- Review your own performance

Correspond using various formats in your workplace. You should:
- Gather, analyse and collate information and use this information to correspond using various   formats
- Collect feedback about your written communication performance and identify ways to improve your skill and ability

Assessment Criteria

Presentation
- The aim and objectives of the presentation and the intended audience were specified
- Information for inclusion in the content was researched, analysed and selected
- The content of the presentation was planned and relevant visual aids were prepared
- The presentation was delivered to identified personnel and the information was logical, clear and accurate
- Questions were responded to about their presentation

Interview
- A formal interview in the workplace was planned
- Appropriate questions to elicit desired information were formulated
- Appropriate records of the interview were kept
- Own interviewing performance was reviewed

Written correspondence

- Information was gathered, analysed and collated and used to correspond in writing, using various formats
- Feedback was collected on own written communication performance
- Ways to improve their written communication ability and skill were identified

M4.16	Understanding work in contemporary society

Reflective Review

This assignment is about understanding work in contemporary society. You should include the following points:

- Examine and describe the nature and purpose of your organisation; and investigate and explain the organisational structure
- Assess the strengths and weaknesses of:
  - your organisational type; and
  - your organisational structure in enabling it to achieve its goals
- Evaluate the changes in the external operating environment that may have an effect on the way that the organisation operates
- Make recommendations for changes that may be required to respond to these external factors

Assessment Criteria

- Examined and described the nature and purpose of own organisation
- Assessed the strengths and weaknesses of organisational type in enabling it to achieve its goals
- Investigated and explained own organisational structure
- Assessed the strengths and weaknesses of organisational structure in enabling it to achieve its goals
- Evaluated changes in the external operating environment that may have an effect on the way that the organisation operates
- Made recommendations for changes that may be required to respond to these external factors

M4.17	Understanding entrepreneurship

Reflective Review

This assignment is about understanding entrepreneurship. You should:

- Explore the possible nature, character and motivation of an entrepreneur
- Determine the political, social and economic factors that encourage or inhibit an enterprise
- Explore how a new enterprise can be developed
- Investigate various options that are available to finance and market a new enterprise
- Explain how to manage and sustain the growth of a new enterprise

Assessment Criteria
- Explored the possible nature, character and motivation of an entrepreneur
- Determined the political, social and economic factors that encourage or inhibit enterprise
- Explored how a new enterprise can be developed
- Investigated various options available to finance and market a new enterprise
- Explained how to manage and sustain the growth of a new enterprise

M4.18	**Understanding accounting for management control**

Reflective Review

This assignment is about understanding accounting for management control. You should explore the following:
- Examine, describe and explain the costing system(s) used in your organisation; and how budgets are devised and controlled
- Examine and describe the actions that individual managers can take to ensure that they adhere to the budgets in their sphere of control
- Examine and explain what method(s) of investment appraisal are used in your organisation
- Examine the techniques used in your organisation to evaluate supply chain decisions (such as make/buy decisions). Interpret and explain how other strategic or non-financial factors may influence investment or supply chain decisions

Assessment Criteria

- Examined, described and explained costing system(s) used in own organisation
- Examined and explained how budget plans are devised and controlled in the organisation
- Examined and described the actions individual managers take to ensure that they adhere to the budgets in their sphere of control
- Examined and explained the method(s) of investment appraisal used in own organisation
- Explained the techniques used in the evaluation of supply chain decisions (such as make/buy decisions)
- Interpreted and explained how other strategic or non-financial factors may influence investment or supply chain decisions

M4.19	**Understanding and interpreting financial data**

Reflective Review

This assignment is about understanding and interpreting financial data in your organisation. You should explore the following:
- Identify your organisation's stakeholders and explain their various expectations
- Explain the various financial documents produced by the organisation and the information which they provide
- Identify, explain and calculate the relevant performance indicators based on the organisation's financial document and interpret these to provide as assessment of the organisation's performance in a way that is relevant to each of its stakeholders

Assessment Criteria
- Identified the organisation's stakeholders and explained their various expectations
- Explained the various financial documents produced by the organisation and the information which they provided
- Identified, explained and calculated relevant performance indicators (PIs) based on the organisation's financial documents
- Interpreted these PIs to provide an assessment of the organisation's performance in a way relevant to each of its stakeholders

M4.20	Understanding the importance of marketing for an organisation

Reflective Review

This assignment focuses on understanding the importance of marketing for your organisation. You should include the following:
- Explore the market within which your organisation operates. You should focus on the market size, your organisation's share of that market and the profile of its competitors'
- Examine and explain the role of the marketing function and their activities within your organisation
- Evaluate the effectiveness of marketing within your organisation and where necessary make recommendations for improvement

Assessment Criteria

- Explored the market within which own organisation operates, focussing on market size, the organisation's share of that market and its competitor profile
- Examined and explained the role of the marketing function and activities within own organisation
- Evaluated the effectiveness of marketing within own organisation and where necessary make recommendations for improvement

M4.21	Using quantitative methods to solve management problems

Work-based Assignment

This assignment focuses on using quantitative methods to solve management problems. You should include the following:
- Identify and describe a management problem or issue in your organisation
- Research the problem or issue using relevant method(s) to collect quantitative data about the problem/issue. Use quantitative methods to analyse the data that you have collected
- Draw conclusions from the findings of the data analysis

Assessment Criteria

- Identified and described a management problem/issue in own organisation
- Researched the problem/issue using relevant method(s) to collect quantitative data
- Use quantitative methods to analyse the data
- Drew conclusions from the findings of the data analysis

M4.22	Understanding the economics of the marketplace

Reflective Review

This assignment focuses on understanding the economics of the marketplace. You should include the following:
- Use micro-economic principles to analyse the factors affecting the prices of goods or services in the market within which your organisation operates, and the impact that this has on the organisation's financial performance
- Assess the responsiveness of consumers and suppliers to price changes in your organisation or in a related market
- Identify the current barriers to entry and exit from the market in which your organisation operates for new and existing suppliers
- Assess the competitive environment with which your organisation operates and explain the implications this has for prices and financial performance
- Assess how potential economic, political, social and technological developments will affect barriers to entry and exit to the market for new and existing suppliers, and the likely impact this may have on prices and financial performance

Assessment Criteria

- Used micro-economic principles to analyse the factors affecting the prices of goods or services in a market in which the organisation operates, and the impact this has on the organisation's financial performance
- Assessed the responsiveness of consumers and suppliers to price changes in the organisation's own or a related market
- Identified the current barriers to entry and exit from the market in which the organisation operates, for new and existing suppliers
- Assessed the competitive environment in which the organisation operates and explain the implications this has for prices and financial performance
- Assessed how potential economic, political, social and technological developments will affect barriers to entry and exit to the market for new and existing suppliers, and the likely impact this may have on prices and financial performance

M4.23	Forecasting using quantitative methods

Reflective Review

This assignment focuses on forecasting using quantitative methods. You should include the following:
- Develop a forecast for a relevant aspect of your organisation's activities using quantitative forecasting methods
- Propose an appropriate plan to deal with the potential future scenario

Assessment Criteria

- Developed a forecast for a relevant aspect of own organisation's activities using quantitative forecasting methods
- Proposed an appropriate plan to deal with potential future scenario

M4.24	Developing your leadership style

Reflective Review

This assignment focuses on developing your leadership style. You should include the following:

- Examine:
    - the importance of performance and engagement with followers in an organisation, and
    - the six specific scales for leadership
- Examine the three global factors in terms of leadership effectiveness
- Use the:
    - Leadership Style Measure (ILM72) to assess the effectiveness of your own leadership styles, and
    - use the results of your leadership style effectiveness and examine the implications for yourself and your organisation
    - use the results of the global scales to assess your leadership behaviour
- Examine the impact of changes in your work situation on the effectiveness of your adopted leadership style
- Produce an action plan to develop your own leadership style and effectiveness
- Explain the benefits of implementing your action plan and how you will monitor and evaluate your action plan

Assessment Criteria

- Examined the importance of performance and engagement with followers in an organisation
- Examined the six specific scales for leadership
- Examined the three global factors in terms of leadership effectiveness
- Assessed the effectiveness of own leadership styles in terms of the six scales
- Used the results of own leadership style effectiveness and examined the implications for self and own organisation
- Assessed own leadership behaviour in terms of the three global factors
- Examined the impact of changes in the situation on the effectiveness of the adopted style
- Assessed own leadership behaviour in terms of the three global factors
- Examined the three global factors in terms of leadership effectiveness
- Assessed own leadership behaviour in terms of the three global factors
- Produced an action plan to develop own leadership style and effectiveness
- Explained the benefits of implementing the action plan
- Explained how you will monitor and evaluate the action plan

M4.25	Developing individual mental toughness

Reflective Review

This assignment focuses on developing your leadership style. You should include the following:
- Examine:
    - the importance and implications of mental toughness
    - a model that measures mental toughness
- Use the MTQ 48 to measure your mental toughness, and use the results of the mental toughness assessment to examine the implications for yourself and your organisation
- Examine how mental toughness development can be achieved and tools for developing this
- Compile an action plan for developing your mental toughness and explain the benefits of implanting this plan. Explain how this plan will be monitored and evaluated

Assessment Criteria

- Examined the importance and implications of mental toughness
- Examined a model that measures mental toughness
- Assessed own mental toughness using a relevant model
- Used the results of own mental toughness assessment and examined the implications for self and organisation
- Examined how mental toughness development can be achieved
- Examined tools for developing mental toughness
- Compiled an action plan to develop own mental toughness
- Explained the benefits of implementing the action plan
- Explained how you will monitor and evaluate the action plan

M4.26	Understanding the macro economic environment

Reflective Review

This assignment focuses on understanding the macro economic environment. You should assess the following:
- the impact of the current domestic economic environment on your organisation,
- the likely impact of current fiscal and monetary policy on the domestic economic environment and its implications for the organisation in the short to medium term; and the
- impact of the current international economic environment on your organisation and its implications for the short to medium term

Assessment Criteria

- Assessed the impact of the current domestic economic environment on the organisation
- Assessed the likely impact of current fiscal and monetary policy on the domestic economic environment and its implications for the organisation in the short to medium term
- Assessed the impact of the current international economic environment on the organisation and its implications for the short to medium term

M4.27	Communication in management

Work-based Assignment

This assignment is about understanding communication theories, concepts and practises and communicating them effectively in writing. You should include the following points:
- Explained communication theories, concepts and practises
- Explain the importance of effective communication for a middle manager
- Communicate information in a range of appropriate written formats using appropriate tone, language and level of formality. (*Note: You could include samples of written formats produced by   you   in   your   organisation*)
- Select criteria to evaluate your own ability to communicate effectively in writing and collect   feedback from others on your written communication performance. Use this information to identify   our   own   strengths, weaknesses and areas for improvement

Assessment Criteria
- Communication theories, concepts and practises were explained
- The importance of effective communication for a middle manager was explained
- Information was communicated in a range of appropriate written business formats using the appropriate tone, language and level of formality
- Appropriate criteria to evaluate own ability to communicate effectively in writing were selected
- Feedback on own written communication performance were collected
- Own strengths, weaknesses and areas for improvement in communication were identified

M4.28	Understanding financial management

Work-based Assignment

Explain finance within the context of your organisation by:
- Explaining the use of source documents in accounting and the purposes of the main financial documents used within your organisation
- Identifying your organisation's sources of finance or funding
- Explaining the importance of cash flow forecasting and cash flow management to your organisation
- Providing a general assessment of your businesses/organisational performance using appropriate financial measures

Understand the value of management accounting in your organisation by:
- Explaining the role of the management accountant as the provider of management information
- Analysing your stakeholders and their various expectations of your organisation: and
- Explaining the role of performance indicators in monitoring the achievement of objectives

Explain the process of budget setting used in your organisation. In addition, explain how to use budgetary techniques to contribute to controlling cost in own area of operation.

Explain what techniques you could use for monitoring and controlling a budget in your area of operation.

Assessment Criteria

- The source documents used in accounting were explained
- The purposes of the main financial documents used within the organisation were explained
- The organisation's sources of finance / funding were identified
- The importance of cash flow forecasting and cash flow management to the organisation were explained
- A general assessment of the businesses/organisational performance using appropriate financial measures was provided
The role of the management accountant as the provider of management information was explained
- The range of stakeholders was analysed and their various expectations of the organisation explained
- The role of performance indicators in monitoring the achievement of objectives was explained
- The process of budget setting used in the organisation was explained
- The use of budgetary techniques to contribute to controlling cost in own area of operation was explained

M4.29	Managing a healthy and safe environment

Work-based Assignment

Review own organisation's health and safety policy and procedures and recommend improvements. Then conduct a risk analysis to identify actions to ensure the health, safety and welfare of people in own area of operation. You should include the following points:

- Critically review your organisation's health and safety policy and procedures. Based on your review make recommendations for improvements
- Conduct a risk assessment in your own area of operation. Based on your risk assessment explain the actions that are required to ensure the health, safety and welfare of people in your area of operation

Assessment Criteria

- Own organisation's health and safety procedures were critically reviewed
- Appropriate recommendations were made for improvements
- A risk assessment was conducted in own area of operation
- Appropriate actions to ensure the health, safety and welfare of people in your area of operation were explained

M4.30	Managing meetings

Work-based Assignment

This assignment covers a wide-spectrum of understanding and actions required to prepare for and lead a meeting. It also covers the development of a negotiation strategy to achieve a "win-win" scenario. You should include the points shown below:

- Explain the different types and purposes of meetings in your organisation and justify situations when these would be appropriate
- Explain how you prepare prior to a meeting to ensure that you meaningfully contribute towards achieving objectives
- Explain the importance of listening and other interpersonal skills to enhance your effectiveness during a meeting
- Set objectives for and plan a meeting in your organisation. Chair the meeting ensuring adherence to meeting terminology, protocol and procedures during the meeting
- Develop a negotiation strategy, tactics and behaviour in relation to an objective in your organisation where negotiation is required to achieve a "win-win" relationship

Assessment Criteria

- The different types and purposes of meetings in the organisation are explained and situations justified when these different types of meetings would be appropriate
- The way in which a manager should prepare effectively prior to a meeting is explained
- The importance of listening and other interpersonal skills is explained
- Objectives are set for and a meeting is planned in the organisation
- The meeting is chaired and meeting terminology, protocol and procedures are adhered to
- A negotiation strategy, tactics and behaviour in relation to an objective in the organisation is developed to achieve a "win-win" relationship

M4.31	Managing Marketing

Work-based Assignment

This assignment focuses on two aspects. The first is the effectiveness of product and service management and the second the effectiveness of marketing and selling in your organisation. You should also examine ways of improving both. You should include the following points:

- An analysis of the effectiveness of product and service management within the organisation and recommendations for improvement
- An analysis of the effectiveness of marketing and selling within the organisation and recommendations for improvement

Assessment Criteria

- The effectiveness of product and service management within the organisation is analysed and recommendations made for improvement
- The effectiveness of marketing and selling within the organisation is analysed and recommendations made for improvement

M4.32	Analysing and presenting data to inform management decisions

Work-based Assignment

Use spreadsheets to analyse and present numerical data by:

- Gathering and analysing raw data about the organisation using spreadsheets
- Creating tables, graphs and charts to present data you have gathered and analysed

Note: You could analyse and present data within the context of the organisation or any other relevant assignment and present this as evidence for achieving this unit.

Assessment Criteria

- Raw data about the organisation was gathered and analysed using spreadsheets
- Tables, graphs and charts were created to present data gathered and analysed

M5.08	Managing stress and conflict in the organisation

Work-based Assignment

Evaluate the effectiveness of your organisation and yourself in recognising and addressing workplace stress and providing the necessary support. You should include the following points:

- Evaluate the effectiveness of your organisation in recognising workplace stress and providing the necessary support mechanisms
- Evaluate own ability to provide the necessary support using organisational mechanisms

Evaluate the effectiveness of your organisation and yourself in recognising people problems and addressing them. You should include the following points:

- Evaluate the effectiveness of your organisation in recognising and addressing people problems
- Evaluate your own ability to recognise people problems and address them

Assessment Criteria

- The effectiveness of the organisation in recognising workplace stress and providing the necessary support mechanisms were evaluated
- Own ability to provide the necessary support using organisational mechanisms was analysed
- The effectiveness of the organisation in recognising and addressing people problems was evaluated
- Own ability to recognise people problems and address them was evaluated

M5.17	Managing resources

Work-based Assignment

Analyse the efficient use of resources in own area of operation and examine ways of minimising physical waste in own area of operation including the following:

- Analyse how you could ensure
  - the provision of,
  - the effective, efficient and safe use of; and
  - the security of resources in own area of operation in your organisation

- Examine how you could minimise physical waste in your own area of operation in your organisation

Assessment Criteria

- The provision of resources in own area of operation was analysed
- The effective, efficient and safe use of resources in own area of operation was analysed
- The security of resources in own area of operation was analysed
- The minimisation of physical waste in own area of operation was examined

M6.07	**Conducting operations research**

Work-based Assignment

Conduct operations research in your organisation using relevant and appropriate operational research techniques. Make recommendations for improvements based on your findings:

Note: Clearly explain the context within which you will be conducting operations research, the area in which you will conduct your research and why you have chosen this specific area.

Assessment Criteria

- Operational research in the organisation is conducted using relevant and appropriate operational research techniques
- Recommendations are made for improvements based on their findings

Appendix D

Resources and Validated Products

available for the

IQual Certificate in Middle Management

Support materials

Please refer to the ILM Resources Brochure for full details of all products

ILM Products

Unit assessments	A range of ready-to-use assessments for some of the Management units, complete with mark sheets and based on single units. Available to purchase from ILM Customer Services
ILM Super Series 5 *(published by Elsevier from April 2007)*	A fully refreshed fifth edition of Super Series - the best-selling text-based open learning material, providing a direct match to the level 3 units included in these qualifications *Details from Business Managers or ILM Customer Services at Lichfield, or available through a network of distributors, or telephone Elsevier on* 01865 474010 or directorders@elsevier.com
Candidate Ring Binders	Available at a competitive price from ILM Customer Services

Products Validated by ILM which are appropriate to these Qualifications*

Kent Learning Resources	A series of wire-bound workbooks, printed on demand, in a one-workbook = one unit format, specially written for the ILM qualifications. *Details from Kent Learning Resources on Tel: 01622 743659 or tony@kentlearningresources.co.uk*
LRI (Learning Resource International)	A complete E-Solution supporting specific ILM qualifications as indicated in courseware, combining: • E-process – Portal (hosted) • E-content – Learning and support material • Portfolio – hard copy The levels of all LRI courseware have been determined using the National Qualifications Framework Level Indicators as the guideline. An LRI course may offer full or partial coverage of one or more ILM units on the same level, and mapping is clearly indicated on courseware. Contact: Pete Bennett, Chief Executive Officer, LRI, The Old Maltings, 102a High Street, Olney, Buckinghamshire MK46 4BE or visit www.lri.co.uk or telephone 01234 714 778

• Correct at time of print.
• Up-dated details of validated products can be found on the ILM website: www.i-l-m.com

In addition, ILM will provide for centres, free of charge:

• Programme brochures
• Posters
• Exhibition stand loan (return costs + postage payable)

Management Extra

Management Extra is published by Pergamon Flexible Learning, who publish Super Series jointly with ILM. (full details at http://www.managementextra.com). Although not specifically produced to cover the Units in the IQual Certificate in Middle Management, many of the books do provide excellent support for this programme.

The table below identifies which books in the Management Extra series cover ILM Level 4 and Level 5 Units in Management. It should be emphasised that where a book is identified as 'fully covering' a segment this is based on certain assumptions. These are that the identified sections have been completed in full (including activities), that references and further reading (i.e. 'More @') have been followed up, and that there have been opportunities to discuss and apply knowledge and practice skills (e.g. through workshops, etc).

NB: Sections marked ✓ are directly relevant; those marked ✗ are useful additional sources of learning.

Unit		Notes	Title	Section				
				1	2	3	4	5
M4.01	Understanding the management role	Quite well covered but extra needed on communicating with stakeholders and the value of networks and networking skills	*Positive Working Relationships*	✓	✓			✓
			Leading Teams		✓			
			Leadership and Management in Organisations	✓	✓			
			Development for High Performance		✓			
M4.02	Developing management skills	A useful but minor contribution to the Unit	*Making Sense of Data and Information*	✗				
			Effective Communications		✗	✗	✗	

Unit		Notes	Title	Section				
				1	2	3	4	5
M5.08	Managing stress and conflict in the organisation	Fully covered	*Managing Yourself*				✓	✓
			Managing for Results				✓	
			Positive Working Relationships					✓
			Development for High Performance			✓		
M4.27	Communication in management	Fully covered	*Effective Communications*	✓	✓	✓		
			Positive Working Relationships	✓				
M4.28	Understanding financial management	Fully covered	*Financial Management*	✓	✓	✓	✓	✓
M4.29	Managing a healthy and safe environment	Fully covered	*Managing Health, Safety and the Work Environment*	✓	✓			(✓)
M5.17	Managing resources	Quite well covered	*Managing Health, Safety and the Work Environment*				✓	✓
			Quality & Operations Management			✓	✓	✓
M4.30	Managing meetings	Fully covered	*Effective Communications*	✓	✓			
			Positive Working Relationships		✓	✓	✓	
M4.31	Managing marketing	More or less fully covered, but more exploration of new product development needed and sales techniques and sales management	*Managing Markets and Customers*	✓	✓	✓	✓	✓
M6.07	Conducting operations research	Useful introduction, but much more needed on the development of knowledge and practical application	*Making Sense of Data and Information*				✓	
M4.32	Analysing and presenting data to inform management decisions	Well covered, but needs more practice to develop knowledge and skills	*Information and Knowledge Management*	✓				
			Making Sense of Data and Information	✓	✓	✓		

List of Management Extra titles

Business Environment	Recruitment and Selection
Positive Working Relationships	Leading Teams
Development for High Performance	Reputation Management
Managing for Results	Effective Communications
Managing Yourself	Reaching Your Goals Through Innovation
Change Management	Leadership and Management in Organisations
Information and Knowledge Management	Making Sense of Data and Information
Quality and Operations Management	Managing Health, Safety and the Work Environment
Financial Management	Managing Markets and Customers
Project Management	Managing Legal And Ethical Principles