

**ILM LEVEL 3
CERTIFICATE
IN EFFECTIVE
MANAGEMENT**



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Institute of Leadership & Management (ILM)

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ILM LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT (QCF)

[Qualification No. – 500/8192/5]

Note: This qualification specification should always be read in conjunction with the “Supporting Notes for ILM VRQs” document which is downloadable from ILM website or it can be accessed via your Quality Manager/External Verifier or from the ILM Customer Services Team by emailing at customer@i-l-m.com

ILM Level 3 Certificate in Effective Management Qualification Specification	© Institute of Leadership & Management	Version: December 2011
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*other suggested assessments for units are also available on the ILM website under ILM shop.

QUALIFICATION OVERVIEW:

ILM Level 3 Certificate in Effective Management		
Purpose of the qualification	Is to give practising or potential managers the foundation for their formal development in this role. The qualification does this by developing basic leadership and Effective Management skills and assisting participants in gaining the basic knowledge required by a manager.	
Progression routes	<ul style="list-style-type: none"> • L3 Certificate in Leadership and Management • L3 Diploma in Leadership and Management • L4 Qualifications in Management or Leadership • L5 Qualifications in Management or Leadership or Management and Leadership Another qualification at a suitable level within or outside the National Qualifications Framework or the Qualifications and Credit Framework	
Credit Value	25 (minimum)	
Induction	1 Hour	
Tutorial Support	At least 1 hour	
Guided Learning Hours (this includes time for induction, tutorial support and the units guided learning hours)	Minimum 62	
To be completed within	3 Years	
Structure	Mandatory Units	Credit Value
	M3.02 Understanding change in the workplace	2
	M3.03 Planning Change in the workplace	2
	M3.04 Achieving objectives through time management	1
	M3.10 Introduction to leadership	2
	Optional Units	Credit Value
	M3.01 Solving problems and making decisions	2
	M3.05 Writing for business	1
	M3.06 Managing creativity and innovation in the workplace	1
	M3.07 Obtaining information for effective management	2
	M3.08 Managing customer service	1
	M3.09 Giving briefings and making presentations in the workplace	1
	M3.11 Building the team	1

M3.12 Motivating to perform in the workplace	2
M3.13 Developing yourself and others	2
M3.14 Managing conflict in the workplace	1
M3.15 Managing stress in the workplace	1
M3.16 Managing the employment relationship	2
M3.17 Recruiting, selecting and inducting new staff in the workplace	3
M3.18 Coaching and training your work team	2
M3.19 Providing quality to customers	2
M3.20 Planning to work efficiently	2
M3.21 Organising and delegating	1
M3.22 Managing projects	2
M3.23 Managing health and safety at work	3
M3.24 Understanding organisations in their context	2
M3.25 Understanding culture and ethics in organisations	2
M3.26 Managing performance	1
M3.27 Working with costs and budgets	1
M3.28 Managing the efficient use of materials	1
M3.29 Managing the effective use of equipment	1
M3.30 Understanding the communication process in the workplace	1
M3.31 Influencing others at work	1
M3.32 Communicating one-to-one at work	1
M3.33 Effective meetings for managers	2
M3.34 Understanding workplace information systems	1
M3.35 Marketing for managers	1
M3.36 Leading a team effectively	2
M3.37 Developing own leadership capability using action learning	10
M3.38 Introduction to managing and maintaining property and assets	3
M3.39 Introduction to the effective management of space within own organisation	3
M3.40 Understanding support services operations	3
M3.41 Managing sustainability and environmental issues	3

	M3.42 Managing utility services and energy efficiency in the workplace	2
	M3.43 Understanding procurement and supplier management in the workplace	2
	M3.44 Understanding facilities management within the context of an organisation	4
	M3.45 Managing and developing relationships in the workplace	2
	M3.46 Managing contracts and contractors in the workplace	2
	M3.47 Delivering service in the workplace	2
	M3.48 Understanding incident management and disaster recovery in the workplace	2
	M3.49 Understanding security measures in the workplace	2
	M3.51 Understanding advanced site waste management	1
	M3.52 Writing a site waste management plan	5
	M3.53 Implementing a site waste management plan	6

OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT

It is the centres responsibility to ensure that they have competent and suitably qualified staff involved in delivering, quality assuring and/or assessing qualifications.

The table below shows the occupational competence requirements of tutors, internal quality assurers and/or assessors. Given that occupational competence requirements will vary greatly between lower and higher level qualifications, this table will highlight if there is an additional requirement of any qualification specific occupational competency.

Tutors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the qualification(s).	<ul style="list-style-type: none"> • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. • Show evidence of information or documents prepared for learners such as a learner journey plan (SoW), lesson plan, learner guidance notes, tutorial support plan etc. for the ILM qualification. • Show evidence of participation in Continuing Professional Development (CPD) in relation to the relevant field and qualification requirements.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> • Be able to prove that they have current experience of delivering training appropriate to the level and subject area of this qualification
A qualification in support of teaching/training.	<ul style="list-style-type: none"> • Ideally hold a valid and recognised teaching/training qualification.

Internal Quality Assurers and/or Centre Assessors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	<ul style="list-style-type: none"> • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. • Show evidence of carrying out CPD in order to familiarise themselves with current standards for assessment/verification in the subject area of this qualification.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> • Demonstrate clear evidence of current experience in quality assurance and/or assessment appropriate to the level and subject area of this qualification
A qualification in support of assessment and/or internal quality assurance.	<ul style="list-style-type: none"> • Ideally hold an assessment qualification (e.g. TAQA or equivalent)
Experience and a working knowledge of the operational and assessment processes for the relevant qualification.	<ul style="list-style-type: none"> • Demonstrate an understanding of the organisation's management centric policies, procedures and practices. • Demonstrate knowledge and understanding of ILM's quality assurance policy, procedures and requirements.

ASSESSMENT GUIDANCE FOR THE LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT

A brief introduction on ILM's Assessment Strategy can be found in *Supporting notes for ILM VRQs*. For detailed information, centres are encouraged to refer to the various assessment guides that are available from the ILM Customer Services Team at customer@i-l-m.com or refer to the Centre Manual (www.i-l-m.com/centres.aspx). This segment gives you specific guidance around assessments for the Level 3 Certificate in Effective Management.

Appendix B in this document outlines the assessments and mark sheets for the units in this qualification and Appendix C shows suggested optional units assessments. Centres should use the prescribed assessments. However some flexibility is permitted. In exceptional circumstances and to meet a specific need a centre may deviate from the prescribed assessment subject to prior written approval from ILM. Equal opportunities issues are relevant to all units of study and these aspects should be explicitly addressed in the delivery and assessment of this programme. The table below gives a brief overview of the units and assessments:

Mandatory Units	Assessments
M3.02 Understanding change in the workplace	Change Management Report
M3.03 Planning Change in the workplace	
M3.04 Achieving objectives through time management	
M3.10 Introduction to leadership	Reflective Review

Learners are likely to come from a variety of backgrounds, in that they will have had different training and work experiences, differing ambitions and opportunities, centres therefore can encourage learners to select topics for assessment in their own organisation and/or area of work, (or within another organisation if they are currently unemployed or self-employed). They should ensure learners are able to present their work as simple and clearly as possible. An approximate word count is given for each assessment. This should be seen as a guide to help achieve a balanced piece of work.

Centres must ensure that learners adequately complete all sections of the assessment. To ensure all learning outcomes are assessed, section passes have been provided in the assessments. To assist this practice, ILM normally applies a pass mark of 50% in each section as reflecting a minimum pass. Centres must note that compensation between learning outcomes is not allowed in any QCF unit.

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A P P E N D I X - A

UNIT SPECIFICATIONS FOR THE ILM LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT

Title:	Understanding change in the workplace (M3.02)
Level:	3
Credit value:	2
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand change in an organisation	1.1 Explain the benefits of innovation and change for the organisation 1.2 Identify the barriers to change and innovation in the workplace and explain practical ways of overcoming these barriers 1.3 Explain why communication is important in successful implementation of change
2. Understand the effects of change on people and finance in an organisation	2.1 Explain possible human and financial effects of change upon people, departments and the organisation
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of understanding change as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: C5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Restricted to ILM and WAMITAB

Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The benefits of change and the consequences of not changing • The role of change in the survival and prosperity of organisations • Concepts of creativity and innovation and their significance for organisational success and change management • The role of communication in successful implementation of change • Barriers to change and innovation – how to identify them and other difficulties in implementing change • Means of overcoming barriers and difficulties including unfreezing and freezing techniques • Methods to monitor and control progress of change against plan, including use of Gantt charts, network planning
2	<ul style="list-style-type: none"> • Change fatigue and its adverse effects • Ways to organise and co-ordinate resources and activities to achieve planned change • Simple introduction to the difference between fixed and variable costs • Direct and indirect aspects of change – human and financial effects upon other people, departments and organisations

Title:	Planning change in the workplace (M3.03)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the forces for change in an organisation	1.1 Identify the forces that may require own organisation to change by conducting a simple PESTLE and/or SWOT analysis
2	Understand planning for change in an organisation	2.1 Give an example of change required in the workplace reflecting the SWOT and/or PESTLE analyses 2.2 Use a technique for planning change within the context of the example given 2.3 Identify relevant human and financial factors in the consideration of change within the context of the example given 2.4 Explain how to communicate with and involve people to facilitate effective change
3	Understand continuous improvement in an organisation	3.1 Explain the importance of quality awareness and the need to continuously improve the organisation 3.2 Identify the organisation's quality standards 3.3 Use a continuous improvement tool or technique relevant to the workplace 3.4 Explain ways of involving the team in quality and continuous improvement 3.5 Discuss ways to evaluate continuous improvement activities
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of planning change as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: C5

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Restricted to ILM & City & Guilds
Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Simple PESTLE analysis • Organisational SWOT analysis
2	<ul style="list-style-type: none"> • The principles of change management • Basics of system theory and process design • Methods of planning for change • Use of Gantt charts, network planning as tools for planning change • Identification of human and financial factors in the consideration of change • Differentiate between fixed and variable costs • The importance of communication and involving people to facilitate effective change
3	<ul style="list-style-type: none"> • The importance of quality awareness and the need to strive for continuous improvement • Service standards as appropriate to own organisation • Quality circles, benchmarking, Kaizen • The importance of commitment and loyalty to the organisation • Ways to involve people in quality and continuous improvement, including suggestion schemes/role models • Ways to evaluate continuous improvement activities

Title:	Achieving objectives through time management (M3.04)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Know how to use effective time management to prioritise and achieve objectives	1.1 Set SMART objectives for own workload, list them in order of priority and establish appropriate time scales for their achievement 1.2 Plan the achievement of the objectives using an established time management technique 1.3 Identify constraining or limiting factors that could hinder the achievement of any one of these objectives 1.4 Briefly explain the monitoring techniques for any objective
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of achieving objectives through time management as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: A2, F1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Restricted to ILM

Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • How to set SMART objectives • Setting priorities to achieve objectives • Urgency vs. importance when prioritising • Negotiating techniques • Time logs • Constraining or limiting factors • Application of simple planning and monitoring techniques • Methods to measure achievement of objectives

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 review 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 Management & Leadership 2008 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)	Council for Administration (CfA)	
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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:	Solving problems and making decisions (M3.01)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Know how to describe a problem, its nature, scope and impact	1.1 Describe a problem, its nature scope and impact
2	Know how to gather and interpret information to solve a problem	2.1 Gather and interpret information to identify possible solutions to a problem
3	Know how to solve a problem	3.1 Briefly summarise the options, providing facts and evidence, not just opinion 3.2 Use at least <u>one</u> simple decision making technique to evaluate options to arrive at the best solution
4	Know how to plan the implementation and communication of decisions	4.1 Plan the implementation and communication of the decision 4.2 Briefly discuss which monitoring and review techniques could be used to evaluate outcomes
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of solving problems and making decisions as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: C2, C5, C6, F6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)

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	Restricted to ILM, City & Guilds and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Simple ways to recognise, investigate and analyse problems • Objective setting in relation to problem • Brainstorming and creative thinking techniques
2	<ul style="list-style-type: none"> • Difference between data and information • How to calculate and use simple averages and basic summary statistics • How to prepare and use grouped data and tables • Interpretation of charts and diagrams • Methods of indexing, referencing and structuring qualitative information
3	<ul style="list-style-type: none"> • How to evaluate options • The importance of adequate and relevant information for effective decision-making • Identification of what information is relevant to specific decisions • Simple decision making techniques
4	<ul style="list-style-type: none"> • Effective presentation of a case – ie, providing facts and evidence, not just opinion • Monitoring and review techniques to evaluate outcomes of problem solving activities

Title:	Writing for business (M3.05)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to write a report	1.1 Write a report to meet specified standards 1.2 Incorporate basic statistics and visual material in the content or in an appendix 1.3 Use effective and appropriate tone, language and level of formality in a report	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of writing for business as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS:	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)	
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	Restricted to ILM	
Units available from	01/01/2008	
Unit guided learning hours	6	

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The value of the written word in avoiding errors and providing permanent records • The purpose and conventions of letters, memos, reports and e-mails in use within the organisation • Planning for writing, including use of available information and the needs of the recipient • Image, structure, layout conventions including “house styles” • The importance of objectives and the reader • Report structures – to meet standard and specific requirements (ILM and/or in-company formats) • Incorporation of statistics and visual materials, and the use of appendices to enhance understanding • Effective and appropriate use of tone, language, level of formality in a range of cases • Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Managing creativity and innovation in the workplace (M3.06)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand the importance of creativity and innovation for the organisation	1.1 Use a technique to encourage creative ideas amongst team members 1.2 Explain barriers to creative thinking and resistance to innovation within the team 1.3 Explain how to gain the commitment of others in moving creative ideas forward 1.4 Evaluate creative and innovative ideas and make reasoned recommendations to managers and others	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of creativity and innovation as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)	
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	Restricted to ILM	
Units available from	01/01/2008	
Unit guided learning hours	7	

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The importance of creativity and innovation for organisational success • Auditing techniques to assess an organisation's ability to innovate • A range of different techniques for encouraging creative ideas amongst team members (e.g.: brainstorming, nominal group technique, TRIZ, SCAMPER, synectics, random juxtaposition) • Barriers to creative thinking and resistance to innovation within organisations • Methods of leading others in a creative ideas generation and assessment process • Evaluation techniques to assist making reasoned recommendations to managers and others

Title:	Obtaining information for effective management (M3.07)
Level:	3
Credit value:	2
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to gather information	1.1 Use basic data collection techniques to gather information from external, internal and internet sources
2 Know how to validate and analyse information and draw conclusions	2.1 Check the validity and accuracy of information gathered 2.2 Analyse information gathered and draw conclusions
3 Know how to design and analyse questionnaires	3.1 Design a simple workplace questionnaire that includes a minimum of <u>four</u> different types of questions 3.2 Describe a representative sampling technique 3.3 Briefly describe how the questionnaire could be administered 3.4 Describe a simple technique for analysing the results of the questionnaire
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of obtaining information as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: D1, F1 Links to SFEDI 2006 NOS: YS4
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 Council for Administration (CfA)

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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The value of valid, accurate and timely information to the organisation • Basic means of data collection – questions, observation, surveys, source records • Basic questioning techniques • How to prepare and use surveys and questionnaires • Constraints on the availability of and access to data, including legal issues • How to validate data and information
2	<ul style="list-style-type: none"> • Means of determining the value (validity, accuracy, efficiency, effectiveness) of information sources • Internal sources – documentation, standard reports, etc • External published sources (including Government statistics) • Accessing the Internet, use of search engines, usefulness of web-based materials • Obtaining information from the internet employing Boolean search terms (the words – and, or, not) • Analysing information • Reaching conclusions
3	<ul style="list-style-type: none"> • Application of questionnaires in the workplace • Basic representative sampling techniques • Recognition of realistic response rates to questionnaires • How to design effective questions and response options • The importance of structure and appearance in questionnaire design • Pilot surveys to test reliability and validity • Administration of questionnaires by post, telephone or interview • Simple techniques for analysing the results of questionnaires

Title:	Managing customer service (M3.08)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand basic customer service	1.1 Briefly describe at least <u>two</u> legal rights of customers 1.2 Briefly describe <u>two</u> of the organisation's commitments to customers 1.3 Briefly describe the manager's responsibilities in relation to customer service	
2 Know how to care for the customer	2.1 Identify an external and an internal customer of the organisation 2.2 Describe how customer needs are identified 2.3 Explain how customer service standards and procedures are used to meet customer needs 2.4 Explain how they could monitor customer service against the standards set	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of meeting customer needs as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: F6, 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)	Council for Administration (CfA)	
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • How to identify the internal customer chain, external customers, and potential customers • Techniques for identifying customer needs • Methods of establishing relevant customer care standards and procedures • Use of appropriate planning and quality systems to monitor and fulfil customer care standards • Methods to establish and maintain effective relationships with customers at all stages
2	<ul style="list-style-type: none"> • The legal rights of customers (law of contract, sale of goods and services, trade descriptions, etc) • Organisational commitments to customers (contract terms, warranties and guarantees, service standards, etc) • Methods of identifying customer requirements and expectations • Standards and benchmarks • Manager's responsibilities and authority in relation to customer service

Title:	Giving briefings and making presentations in the workplace (M3.09)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Know how to conduct a briefing or presentation		1.1 Select appropriate information in line with the objectives of the briefing or presentation 1.2 Logically structure the content of the briefing or presentation 1.3 Introduce an appropriate management topic clearly 1.4 Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation 1.5 Present information clearly 1.6 Display confidence in the subject matter 1.7 Keep to time 1.8 Use feedback to check understanding 1.9 Design a simple evaluation form
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of briefing and presentation skills as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS:	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)	
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	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Selection of relevant information content • How to plan and prepare effectively for briefings (account for Purpose; Audience; Content; Form) • Formal and informal presentation skills including platform techniques and visual aids • How to evaluate briefings/presentations • Use of feedback to check understanding • Reporting back to management after briefing • The value of various methods of data presentation – tables, graphs, charts, diagrams, Gantt charts, etc • Evaluation of alternative methods to select the most appropriate for a given situation • How to construct a range of data presentation methods • The use of spreadsheets for the creation of graphs, charts and diagrams • How to interpret information contained in charts and diagrams, and explain this to others • Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Building the team (M3.11)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand how to develop and maintain trust at work	1.1 Explain behaviours which could develop and maintain trust at work 1.2 Explain why confidentiality is important in building and maintaining trust in the team
2	Know how to build the team	2.1 Give <u>one</u> example of a group and <u>one</u> example of a team within the workplace. Justify the classification of examples given 2.2 Briefly describe the stages of an established model of group formation Explain how a manager could benefit from knowing team members' preferred team roles
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of building the team as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: C5, C6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	5
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The nature of formal and informal working relationships • Role of open communications and the need to keep people informed, in creating effective working relationships • Range of internal and external contacts • Differences between people, and the effects on relationship building • Differences in organisational culture, and the effects on relationship building at work • Social skills appropriate to the workplace • Range of behaviours which develop, maintain and destroy trust at work • The importance of maintaining confidentiality in the workplace
2	<ul style="list-style-type: none"> • Characteristics of groups and teams – the differences, examples within the workplace • Tuckman’s theory of group formation • How to identify team roles (e.g. Belbin) and the uses and implications for managers • Building a balanced team to achieve objectives

Title:	Motivating to perform in the workplace (M3.12)
Level:	3
Credit value:	2
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the value of assessing performance to meet organisational and individual needs	1.1 Explain the value of formal and informal performance assessment in the workplace 1.2 Identify ways that could ensure fair and objective formal assessment
2 Know how to motivate the team to improve performance in the workplace	2.1 Outline the factors that influence how people behave at work 2.2 Explain how to apply <u>one</u> basic recognised theory of motivation to team members
3 Understand the value of feedback in the workplace	3.1 Explain the importance of feedback to improve communication and performance 3.2 Compare the effectiveness of different types of feedback
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of motivating the team to perform as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The purpose and value of formal and informal performance assessment at work (formal assessment includes performance review/appraisal) • Ways to ensure fair and objective assessment • Preparations necessary for effective, valid and reliable assessments • Feedback techniques following assessment • Roles and responsibilities of individuals in the performance assessment process • Appropriate assessment records • How to conduct formal appraisals
2	<ul style="list-style-type: none"> • Overview of the factors influencing behaviour at work • Basic theories of motivation and their application to teams and individuals • Styles and patterns of behaviour at work • Range of techniques to motivate individuals and monitor performance • Positive approaches to offset negative attitudes in the workplace
3	<ul style="list-style-type: none"> • The importance of feedback to improve communication and performance • Types of feedback and their relative values in communication (visual, written, oral, aural) • Use of feedback to improve the performance of individuals in the workplace • How to use feedback techniques (formal/informal; positive/negative; timescale; format) • How to elicit feedback from others to improve own performance

Title:	Developing yourself and others (M3.13)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to identify development needs and develop self and others to achieve organisational objectives	1.1 Use at least <u>one</u> simple technique for identifying own development needs and the development needs of <u>one</u> other member of the team 1.2 Identify own learning style(s) and the learning style(s) of <u>one</u> other member of the team 1.3 Briefly analyse <u>two</u> learning/development options to meet need(s) of self and <u>one</u> other member of the team 1.4 Identify barriers to learning and explain how these barriers can be overcome 1.5 Identify support mechanisms for the development of self and <u>one</u> other member of the team 1.6 Describe methods used to monitor the development of self and <u>one</u> other member of the team	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of developing self and others as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: A2, C6, 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)	Council for Administration (CfA)	
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Use of job description, matching to own CV • Personal SWOT analysis • Organisation's objectives and development plans and significance for own development • Obtaining feedback on performance from line managers and colleagues • Simple training needs analysis – using outcomes of SWOT and PESTLE analyses • Identification of preferred learning styles • The importance of taking responsibility for own personal development • Value of learning and the importance of encouraging a commitment to learning • Identification of potential development opportunities • Barriers to learning, and methods to overcome them • Development plans including timescale and resource implications • Available support mechanisms • How to compile learning logs and records of activities

Title:	Managing conflict in the workplace (M3.14)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to resolve conflict in the workplace	1.1 Identify causes of conflict at work 1.2 Describe the stages in the development of conflict 1.3 Explain the effects of conflict on individual and team performance at work 1.4 Explain any recognised technique a manager could use to minimise and resolve conflict in the workplace 1.5 Describe how a manager could create harmony at work and engender a positive atmosphere in order to minimise the adverse effects of conflict	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of managing conflict and supporting individuals as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: D1	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)	
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	Restricted to ILM	

Units available from	01/01/2008
Unit guided learning hours	4
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Possible causes of internal conflict, eg: personal versus business/enterprise objectives/values • Causes of interpersonal friction at work, including bullying and harassment • The effects of conflict on performance and the individual at work • Stages in the development of conflict • The manager's responsibility in minimising and resolving conflict, and techniques to achieve this • Ways to create harmony at work and engender a positive atmosphere

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 <u>one</u> 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 review 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 Management & Leadership 2008 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 Council for Administration (CfA)	
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	Restricted to ILM	

Units available from	01/01/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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:	Managing the employment relationship (M3.16)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand diversity in the workplace	1.1 Identify the main provisions of statutory requirements for the employment relationship, discrimination at work and fair employment 1.2 Identify the organisation's employment policies and procedures that could guide the first line manager in managing diversity in the workplace 1.3 Explain the importance of diversity in the workplace 1.4 Explain the consequences of non-compliance with diversity policies for own work area and for the organisation	
2 Know how to maintain discipline in the workplace	2.1 Identify the organisation's employment policies and procedures that could guide the first line manager in dealing with disciplinary issues 2.2 Describe how they could monitor discipline in the workplace 2.3 Briefly describe the legal aspects of the disciplinary process 2.4 Review own ability to maintain discipline in the workplace	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of the employment relationship as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: B11, D1, 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)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Definition of diversity and its impact on the organisation and its activities • Legislation as it affects employment – sex, age, ethnicity, disability, etc • Own organisation’s policies and procedures • Significance of diversity in the market place • The consequences of non-compliance for own work area and the organisation
2	<ul style="list-style-type: none"> • Organisational employment policies, (e.g. relating to time-keeping, absenteeism, conduct, level of performance, attitude and behaviour, gross misconduct) • Records and other means to support and monitor the disciplinary process • Legal aspects of disciplinary processes

Title:	Recruiting, selecting and inducting new staff in the workplace (M3.17)	
Level:	3	
Credit value:	3	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to plan to recruit	1.1 Identify the organisation's policies and procedures that could guide the first line manager in recruitment, selection and induction 1.2 Conduct a job analysis and prepare a job description and person specification for a post within own area of responsibility	
2 Know how to select the right person	2.1 Explain how they could prepare for selection interviews to ensure impartiality and optimum decision making in selecting the most suitable applicant 2.2 Explain a recognised selection technique that could be used during interviews	
3 Understand the induction process	3.1 Explain the importance of effective induction 3.2 Describe the phases of induction in the organisation 3.3 Describe which legal and practical aspects of health and safety should be included in the organisation's induction process 3.4 Explain <u>one</u> method that could be used to record an individual's progress during induction 3.5 Explain how an induction process could be evaluated	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of recruitment, selection and induction as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: 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)	Council for Administration (CfA)
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Own organisational recruitment policies and procedures • Basic legal aspects of recruitment • Simple techniques for job analysis • How to prepare job descriptions and person specifications • Range of methods of advertising vacancies, internally and externally, and how to select the most appropriate for a variety of posts
2	<ul style="list-style-type: none"> • The relative merits of internal and external applications • Use of job descriptions and person specifications to shortlist applicants • Preparation for selection interviews to ensure impartiality and optimum decision • Selection interviewing techniques • Alternative methods for selecting the most suitable applicant
3	<ul style="list-style-type: none"> • The importance of effective induction • The phases of induction (e.g.: organisational, local team, facilities, spread over time) • Matching of organisational and individual needs during induction • Legal and practical aspects of health and safety to be included • Methods to monitor and record an individual's progress • How to evaluate the effectiveness of the induction process

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 <u>two</u> 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 <u>one</u> 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 <u>one</u> 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 review 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 Management & Leadership 2008 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)	Council for Administration (CfA)

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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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:	Providing quality to customers (M3.19)
Level:	3
Credit value:	2
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand quality within an organisation	1.1 Explain why quality is important to internal and external customers in the organisation 1.2 Explain what is meant by Total Quality Management 1.3 Explain the difference between design quality standards and process quality standards 1.4 Identify <u>one</u> example of the cost of quality in the workplace
2 Know how to deliver quality within an organisation	2.1 Briefly describe the quality system used by the organisation 2.2 Identify <u>two</u> quality standards set for the organisation 2.3 Briefly describe tools used to monitor quality in the workplace 2.4 Briefly describe records for maintaining quality in the workplace 2.5 Identify <u>two</u> practical and positive steps to improve quality to meet customer requirements in the workplace
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of providing quality to customers as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: 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)	Council for Administration (CfA)

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	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Quality and its importance to customers (internal and external); difference between quality assurance and quality control • Difference between design quality and process quality standards • The cost of quality (positive and negative aspects) • Total quality management
2	<ul style="list-style-type: none"> • Quality systems – ISO 9000, EFQM and liP (the benefits of accreditation, and how to gain it) • The total quality management concept • Practical steps to quality – team approaches • Records for maintaining quality • Tools for quality – the role of statistics in quality control as relevant to organisation

Title:	Planning to work efficiently (M3.20)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to plan work	1.1 Identify targets set for the team; and state indicators to measure performance 1.2 Use <u>one</u> appropriate planning technique to plan a job activity 1.3 Explain <u>one</u> technique to monitor and control a planned job activity 1.4 Explain the importance of the supply chain in delivering results and meeting customer requirements	
2 Understand the importance of efficiency and effectiveness to achieve objectives	2.1 Explain the importance of effectiveness and efficiency to achieve their workplace objectives 2.2 Explain how efficiency and effectiveness are measured in their organisation	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of planning to work efficiently as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: 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)	Council for Administration (CfA)	
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	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Links between organisational and team objectives • Target setting and performance indicators • Planning techniques appropriate to job activity (eg. task/work/production schedules, timetables, rotas, Kanban systems, Just In Time and Take time, etc, as appropriate) • Importance of supply chain in delivering results and meeting customer requirements • Monitoring and control techniques and records • Use of results to “close the loop”, so ensuring that objectives are achieved
2	<ul style="list-style-type: none"> • Definitions of effectiveness and efficiency, and the difference between them • The need to achieve results and meet objectives • The importance to the organisation of operating efficiently • Potential for conflict between efficiency and effectiveness, and ways to resolve this

Title:	Organising and delegating (M3.21)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to organise people to achieve objectives	1.1 Explain the importance of making effective and efficient use of people's knowledge and skills while planning the team's work to achieve objectives 1.2 Use <u>one</u> technique to identify the appropriate person for an activity 1.3 Explain how human resource planning can be used to assure output and quality
2 Know how to delegate to achieve workplace objectives	2.1 Give <u>one</u> example of delegation and <u>one</u> example of empowerment in the workplace 2.2 Identify <u>one</u> barrier to delegation and <u>one</u> mechanism to support delegation 2.3 Explain <u>one</u> technique that could be used to monitor the outcomes of delegation in the workplace 2.4 Review the effectiveness of feedback, recognition and reward techniques in the workplace
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of organising and delegating as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)

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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The importance of planning the team's work to achieve objectives • 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 • Outline of the principles of human resource planning to assure continuity of output and quality
2	<ul style="list-style-type: none"> • Definitions of authority and power; responsibility and accountability • Concepts of delegation and empowerment • Process of delegation including barriers and support mechanisms • Techniques to monitor outcomes of delegation • Feedback, recognition and reward techniques

Title:	Managing projects (M3.22)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Know how to manage a simple workplace project	1.1 Identify a simple workplace project 1.2 Use <u>one</u> simple tool for determining the financial viability of the project 1.3 Plan the project using <u>one</u> appropriate project planning technique 1.4 Set objectives and targets/milestones to monitor performance and review plans 1.5 Use <u>one</u> project evaluation technique
2	Understand the costs and benefits resulting from a workplace project	2.1 List areas where net savings could be achieved as a result of the workplace project 2.2 Identify wider non-financial implications that could result from the workplace project
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of managing projects as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: F1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Basic project design principles • Simple tools for financial appraisal of projects • Project planning techniques (Gantt charts, Flow charts, Network planning) • Use of objectives and targets/milestones to monitor performance and review plans • Project evaluation and review techniques
2	<ul style="list-style-type: none"> • Recent or current examples of change (including the work-based project) • The costs associated with change – increases or savings • Non-financial costs and benefits of change (social, environmental, human elements)

Title:	Managing health and safety at work (M3.23)	
Level:	3	
Credit value:	3	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand health and safety at work	1.1 Identify <u>two</u> pieces of legislation relating to health, safety and welfare at work 1.2 Explain <u>two</u> duties statute law imposes on both the manager and the team 1.3 Outline the manager's responsibilities contained within the organisation's Health and Safety Policy 1.4 Explain the meaning of "a competent person" 1.5 Identify <u>two</u> ways to provide Health and Safety information, instruction and training to the team 1.6 Identify expertise available in the organisation to help and advise the manager on health and safety issues	
2 Understand risk assessment and accident prevention in the workplace	2.1 Conduct a simple risk assessment in the workplace 2.2 Explain <u>one</u> practical accident prevention and control measure that could be implemented in the workplace	
3 Understand the organisation's environmental responsibility	3.1 Explain the importance of environmental responsibility for own organisation 3.2 Describe what action the first line manager could take to enable the organisation to fulfil its environmental responsibility	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of health and safety at work as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: D6, 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)	Council for Administration (CfA)
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • General legal background – statute law, common law negligence and their effects on the workplace • Approved Codes of Practice and Guidance Literature as relevant to own organisation • Experts available to help and advise • HSWA 1974 and Regulations and Fire Precautions Act 1971 • Levels of statutory duty and legal obligations to provide Health and Safety information, instruction and training • Consultation with employees duties inc. Safety Representatives and role of Safety Committees • Recording and reporting of injuries, diseases and dangerous occurrences • Importance of creating a safety culture at work and taking account of health and safety in all decision-making
2	<ul style="list-style-type: none"> • Definition of accident and incident • Simple accident theory – the types and causes of accidents, especially in own organisation • Methods for managing safety in the workplace • Risk assessment procedures and associated documentation • Practical accident prevention in own workplace • Handling and lifting techniques as appropriate • Reacting to and coping with accidents at work
3	<ul style="list-style-type: none"> • The importance of environmental protection to the organisation • The manager’s responsibility to implement environmental protection policies and procedures

Title:	Understanding organisations in their context (M3.24)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand the context within which an organisation operates	1.1 Identify the legal entity of the organisation 1.2 List the operational functions within the organisation 1.3 Use an organisational chart to identify own role, span of control and reporting line in the organisation 1.4 Briefly outline the roles and responsibilities of managers at different levels of the organisation 1.5 Briefly explain the relevance to an organisation of its different stakeholders	
2 Understand the financial environment within which an organisation operates	2.1 Explain the importance of financial information for management 2.2 Identify the main financial documents needed by the organisation and briefly describe the information they contain 2.3 Identify the most significant financial indicators of business performance in the organisation and briefly describe their relevance 2.4 List the main sources of long, medium and short term funds for the organisation	
3 Understand the economic environment within which an organisation operates	3.1 Identify the major economic and political forces which impact upon the organisation 3.2 Briefly describe how government attempts to influence the economy and its effect on the organisation's operations	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of organisations in context as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	13

Additional Guidance about the Unit

Indicative Content:

1	<ul style="list-style-type: none"> • The nature and purpose of organisations • An outline of basic business structures – sole trader, partnership, limited companies, public sector organisations, voluntary sector, etc • Operational functions within the organisation, such as marketing, finance, production, etc • Overview of the management task • Formal and informal organisational relationships between departments and people • Various types of organisation chart • Management roles and responsibilities within the organisation • The relevance of stakeholders, and how to identify them
2	<ul style="list-style-type: none"> • Value of financial information for management • Key source documents used in accounting (invoices, etc) • Simple treatment of the balance sheet, profit and loss account, and cash flow forecast • Simple treatment of income and expenditure accounts (for non-profit organisations) • Financial measures of business performance – how to calculate and interpret simple accounting ratios • An outline of sources of finance
3	<ul style="list-style-type: none"> • Simple outline of the impact of economics and politics on the organisation • Brief outline of the key economic issues – inflation, unemployment, trade cycles,

	<p>exchange rates, economic growth, price mechanism, competition, economic indicators, “factors of production” affecting business location as relevant to own organisation</p> <ul style="list-style-type: none">• How government uses fiscal, monetary and legal measures to influence the economy, and the effects on organisational operations• A brief treatment of key global issues and the challenges they present to organisations• The UK’s (or your own country’s) key trading partners – international competition• The European Union (or other appropriate trading bloc) – its purpose, scope, membership and key institutions• Other international organisations which have an influence on business – as appropriate• Currency exchange rates and their impact on business operations
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Title:	Understanding culture and ethics in organisations (M3.25)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand an organisation's culture	1.1 Describe the dominant culture within the organisation and explain how this influences the management style and team structure 1.2 Recognise own responsibility to promote the organisation's vision and help shape the culture 1.3 Explain how to approach problems in the workplace without creating a 'blame culture' 1.4 Briefly explain how internal politics could arise within the organisation and its possible effects	
2 Understand ethics and values in business	2.1 Define values within the context of the organisation 2.2 Describe how to communicate the organisation's values to the team 2.3 Explain how a first line manager could approach a problem between individuals who have different perceptions, values or cultures 2.4 Explain how a first line manager could approach a problem where an individual's personal values clash with that of the organisation 2.5 Describe <u>one</u> of the organisation's corporate social responsibilities 2.6 Briefly explain the rights given to people at work by the Public Interest Disclosure legislation to "blow the whistle" on perceived malpractice	
3 Understand the organisation's social responsibility	3.1 Explain the importance of social responsibility and sustainability 3.2 Describe what action the first line manager could take to enable the organisation to fulfil its social responsibility	

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of culture and ethics as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Types of organisational culture and how they are manifest in terms of structure of teams and management style • Concepts of values and vision and their relevance to the first line manager role • The effects of different cultures and management styles • The effect of “blame cultures” contrasted with problem solving approaches • How internal “politics” arise within organisations, and their effects • The concept of sub-cultures, and their effective management

<p>2</p>	<ul style="list-style-type: none"> • Definition of ethics in the work context • Alternative perceptions – value judgements • The range of cultures, beliefs and value systems • Personal ethics vs business ethics – potential for both conflict and synergy • Ethical considerations for investment, trading, competition, manufacturing, employment, etc • Social responsibilities of organisations – eg: to the wider community • The costs and possible payback of using an ethical approach • “Whistle-blowing” legislation • Mission statements, business objectives, PR, briefings, community involvement as ways to communicate the organisation’s ethical values
<p>3</p>	<ul style="list-style-type: none"> • The importance of corporate social responsibility and sustainability • The role of first line managers in enabling organisations to fulfil their social responsibility

Title:	Managing performance (M3.26)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know how to manage performance	1.1 Briefly explain the role of the first line manager in performance management 1.2 Set SMART objectives for the team 1.3 Set performance standards for the team 1.4 Explain how they would measure performance against agreed standards 1.5 Select an example of under-performance in the workplace and explain a performance improvement technique available to address this under-performance	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of performance management as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: C6, D1, 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)	Council for Administration (CfA)	
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	Restricted to ILM and WAMITAB	
Units available from	01/01/2008	

Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The differing objectives of stakeholders in the organisation – customers, employees, partners, owners, the community • First line manager's responsibility for managing team and individual performance and meeting objectives • The relevance of SMART objectives, and how to set them • How to set performance standards • How to measure performance against agreed standards • A range of methods for measuring performance and how to select the ideal one • Techniques for performance monitoring and evaluation • How to interpret variances in performance and take appropriate action • Range of performance improvement techniques available to the manager

Title:	Working with costs and budgets (M3.27)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Know how to work to a budget	1.1 Explain the importance of agreeing to a budget and operating within it 1.2 Describe a method to monitor variance between actual performance and budget 1.3 Explain how information used in determining and/or revising budgets is gathered
2 Understand costs within an organisation	2.1 Explain fixed and variable costs; and the concept of break even in relation to the organisation 2.2 Explain the purpose and nature of basic cost statements 2.3 Explain the value of standard costing and its role as a control mechanism 2.4 Briefly describe mechanisms in the organisation to maintain control of costs
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of costs and budgets as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: E1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Shared
Units available from	01/01/2008
Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The nature and purpose of budgets, and the advantages of budgetary control • Methods to monitor variance of actual performance against budget • Causes of variance, their significance and ways of reducing adverse effects • How to gather information for use in determining and/or revising budgets
2	<ul style="list-style-type: none"> • Definition of fixed and variable costs; concept of break even, especially in relation to own organisation • The purpose and nature of basic cost statements; use of standard costs • Role of the manager in cost control • Mechanisms to maintain control of costs, and how to select the optimum method

Title:	Managing the efficient use of materials (M3.28)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand how material stocks are acquired, controlled and recorded in an organisation	1.1 Describe how to determine stock requirements in the workplace 1.2 Explain <u>two</u> consequences of not maintaining optimum stocks in the workplace 1.3 Identify organisational stores/stock control principles and procedures 1.4 Outline the organisation's procedures for recording, receipt and issue of supplies 1.5 Briefly describe why quality standards need to be maintained in the organisation
2 Know how to minimise waste in an organisation	2.1 Identify potential waste in the organisation 2.2 Outline the techniques and/or methods for measuring and monitoring waste in the organisation 2.3 Compile a simple action plan to minimise waste in the workplace
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of using materials efficiently as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS:
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)

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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The importance of maintaining optimum stocks • Methods of determining stock requirements • Stores and stock control principles and procedures • Procedures for recording receipt and issue of supplies and equipment • Maintenance of records for quality standards
2	<ul style="list-style-type: none"> • Areas of potential waste inefficiency including misuse, extravagance, scrap, rework, shrinkage or others as appropriate • Techniques and methods for measurement and monitoring waste • Simple principles of action planning and evaluation as relevant to minimising waste

Title:	Managing the effective use of equipment (M3.29)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the need for effective and efficient use of equipment	1.1 Explain why equipment should be used effectively and efficiently 1.2 Describe how the use of equipment is monitored and controlled in the workplace 1.3 Explain why it is important to have a scheduled maintenance programme for equipment in the workplace 1.4 Compile a simple maintenance programme for equipment in the workplace 1.5 Conduct a simple risk assessment of equipment security in the workplace, and explain how these risks could be reduced
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of managing the use of equipment as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS:
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Restricted to ILM and WAMITAB
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Implications of equipment usage – acquisition and operating costs – for the organisation • Awareness of marginal costs, and how these are used within the organisation • Methods of capacity planning • The importance of scheduled maintenance programmes, and how to plan these • Security issues in the workplace • Risk assessments for security issues • Security and care of equipment

Title:	Understanding the communication process in the workplace (M3.30)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the communication process and relevant communication media		1.1 Outline the stages in the communication process 1.2 Identify <u>two</u> possible barriers to communication in the workplace and describe how each barrier could be overcome 1.3 Name <u>two</u> different types of communication that could ensure effective communication in the workplace and identify an advantage and a disadvantage of each 1.4 Explain how non-verbal communications can influence the receiver 1.5 Briefly explain how to use feedback to check the effectiveness of communication
2 Know how to increase information awareness in the workplace		2.1 Explain how they could increase information awareness in own workplace
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of the communication process as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 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)		Council for Administration (CfA)

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	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The importance of effective communication at work and the effects of poor communication • The stages in communication: sender – encoding – transmission – decoding – receiver • Possible barriers to communication and methods to overcome them • Ways to ensure effective communication in the workplace • Different types of communication including oral, written, visual, and electronic and their relative advantages and disadvantages • Techniques of face-to-face and indirect communication, and when each is appropriate • How to use feedback to check effectiveness of communication
2	<ul style="list-style-type: none"> • The five human senses, and how to use them effectively in the workplace • Active listening skills • Focused and wide angle observation for data gathering in the workplace • Perception and its effects on the interpretation of data • Significance of non-verbal communication and body language

Title:	Influencing others at work (M3.31)
Level:	3
Credit value:	1
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the value of networking	1.1 Explain the value to the first line manager of networking 1.2 Identify an appropriate network for a first line manager and describe methods to establish and maintain effective professional relationships with the identified network
2 Know how to influence and negotiate with others to achieve objectives	2.1 Explain the general principles of negotiation 2.2 Explain a relevant technique for influencing others to achieve workplace objectives 2.3 Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations
Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of influencing others as required by a practising or potential first line manager.
Unit review 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 Management & Leadership 2008 NOS: D1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Shared
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Nature, purpose and value of networking • Identification of relevant networks • Effective networking practices and skills • Network and contact creation • Methods to establish and maintain effective professional relationships at various levels
2	<ul style="list-style-type: none"> • Formal and informal negotiation • Negotiation strategy, tactics and behaviour • Non-verbal communication and social skills • Techniques for influencing others • Value systems and other barriers to acceptance • Conflict and its resolution to achieve a win-win situation • Levels of power and authority, and the impact on negotiation

Title:	Communicating one-to-one at work (M3.32)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand the impact of non-verbal communication	1.1 Identify a range of non-verbal behaviours which can affect people in the workplace	
2 Understand the importance of one-to-one communication	2.1 Explain the importance of one-to-one communication 2.2 List <u>two</u> methods of direct communication used in the workplace 2.3 Explain the importance of succinct and accurate records of one-to-one oral communication	
3 Know how to conduct interviews in the workplace	3.1 Explain how they could prepare for and plan an interview for a specific situation in own organisation 3.2 Explain how to conduct interviews effectively, lawfully and ethically 3.3 Explain how they would evaluate that the interview had been conducted effectively, lawfully and ethically 3.4 Decide what record keeping is required for the type of interview 3.5 Explain how they would provide feedback to the interviewee where appropriate	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of one-to-one communication as required by a practising or potential first line manager.	
Unit review 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 Management & Leadership 2008 NOS: C2, D1, D6, D7, F6, 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)	Council for Administration (CfA)
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	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	9
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Effects of attitudes, perception and cultures on the interpretation of non-verbal messages • Range of non-verbal behaviours which can affect people in the workplace
2	<ul style="list-style-type: none"> • Aspects of face-to-face communication, including appearance, impact, body language • Consideration of the recipient's needs • A range of direct communication methods relevant to the workplace, such as counselling and disciplinary interviewing • Realisation that choice of communication method is political and cultural • Range of direct communication methods relevant to people outside own area of responsibility, including written, telephone, e-mail and face-to-face discussions • The importance of succinct and accurate records of one-to-one oral communication
3	<ul style="list-style-type: none"> • Interview types – formal and informal, including selection, exit, grievance, disciplinary, counselling, appraisal, supervision and information gathering/investigation • Appropriate climate for conducting interviews • Structure and format of interviews according to purpose • Legal and ethical considerations in relation to interviewing • Questioning and listening techniques • Impact of non verbal communication • Ways to analyse and interpret information • Recording information and interview outcomes • The importance of feedback

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 review 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 Management & Leadership 2008 NOS:
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008

Unit guided learning hours	4
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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 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 review 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 Management & Leadership 2008 NOS:	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)	Council for Administration (CfA)	
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 <u>four</u> 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 review 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 Management & Leadership 2008 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)	Council for Administration (CfA)	
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	Restricted to ILM	
Units available from	01/01/2008	
Unit guided learning hours	4	

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • 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:	Leading a team effectively (M3.36)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Connect the team with vision and strategy	1.1 Explain the importance of the team having a common sense of purpose that supports the overall vision and strategy of the organisation or project 1.2 Explain the key role that communication plays in establishing a common sense of purpose and assess the effectiveness of own communication skills	
2 Motivate and develop the team	2.1 Explain the importance of the leader being able to motivate teams and individuals and gain their commitment to objectives 2.2 Describe the main motivational factors in a work context and how these may apply to different situations, teams and individuals 2.3 Explain the role that the leader plays in supporting and developing the team and its members and give practical examples of when this will be necessary	
Additional information about the unit		
Unit purpose and aim(s)	To enable learners to understand the need for teams to have a sense of vision and purpose that reflects the organisation's, and the role that effective communication, motivation and individual and team development play in enabling this to happen.	
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Why organisations or projects need a vision, mission and strategy and what they mean for first line leadership • How to develop team objectives that support overall strategy and vision • The importance of a team having a common sense of purpose that links to vision and strategy • The role that effective communication plays in conveying the overall mission of the organisation or project and how the collective work of the team and it's individual members support this • Effective techniques for communicating vision, goals and objectives in terms of: <ul style="list-style-type: none"> ▪ choosing effective times and places to communicate with the team and individuals ▪ selecting appropriate communication methods ▪ communicating clearly and accurately ▪ active listening skills ▪ receiving and responding appropriately to feedback

2	<ul style="list-style-type: none"> • The critical importance of teams and individuals being motivated and committed to their objectives • Alternative theories of motivation, for example (select as appropriate): <ul style="list-style-type: none"> ▪ Maslow's Hierarchy ▪ MacGregor's Theory X and Theory Y ▪ Herzberg's Two Factor Theory ▪ Vroom's Expectancy Theory ▪ McClelland's 3-Needs Theory • Motivational factors that are available to the leader, for example: <ul style="list-style-type: none"> ▪ safety and security ▪ sense of belonging and common purpose ▪ respect ▪ empathy ▪ recognition of achievement ▪ involvement in decision making ▪ sense of fulfilment ▪ self-development ▪ material rewards ▪ sanctions • An appreciation of how these factors can apply to different situations, teams and individuals • How to select and use appropriate motivational factors • Giving feedback on performance • Basic support needs that individuals may have and how to meet these • The importance of continuous development for the team and individual members
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Title:	Developing own leadership capability using action learning (M3.37)	
Level:	3	
Credit value:	10	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Plan and review the leadership journey	1.1 Identify own leadership strengths and limitations 1.2 Identify and plan appropriate actions to develop own leadership capacity within realistic time scales, using available sources of help and support	
2 Use action learning to develop own leadership capability	2.1 Explain the nature and benefits of action learning, the responsibilities of an individual within an action learning set or group and the role of action learning in own leadership development 2.2 Explain how action learning was used to develop own leadership performance 2.3 Identify, analyse and reflect on improvements in own leadership performance	
Additional information about the unit		
Unit purpose and aim(s)	To enable learners to participate actively in an action learning set to help them develop their leadership capability.	
Unit review 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 Management & Leadership 2008 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)	Council for Administration (CfA)	
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	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	36
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Personal strengths and limitations analysis • Importance of a systematic approach to developing effective leadership skills • Setting objectives for leadership development and their application to work and other contexts • Techniques for developing personal leadership capacity • Sources of information, help and support for leadership development, including theorists, tutors, practising/model leaders, colleagues • How to overcome blockages and obstacles to leadership development • Review and monitoring techniques • Gaining feedback from others on own leadership performance
2	<ul style="list-style-type: none"> • The nature of Action Learning (L=P+Q) as a development medium and the role of the Action Learning Set, the 'Client' and the 'Set Advisor' • Learning styles and the impact of own learning style on role and behaviour in AL set • Techniques for researching problems and questioning techniques to explore problems, reflection and hypothesis forming • Sources of 'programmed' learning to development knowledge and skills • The political and emotional aspects of the group process

Title:	Introduction to managing and maintaining property and assets (M3.38)	
Level:	3	
Credit value:	3	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the estate management function	1.1 Describe the property portfolio of their employing organisation 1.2 Explain the benefits and disadvantages of being a tenant and an owner-occupier 1.3 Describe the basics of the property law 1.4 Describe the purpose of having a property register
2	Understand premises and building services maintenance	2.1 List the building services and fabric components within their organisation's estate 2.2 Explain the purpose of a building asset register 2.3 Identify the ongoing maintenance activities that are carried out and give the resources they or others may need for one of these typical maintenance tasks 2.4 Describe the types of maintenance regimes 2.5 Explain what factors they should consider when developing maintenance plans and schedules 2.6 Explain how a computerised maintenance management systems can enhance performance of recording and tracking maintenance activities
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of managing and maintaining property and assets.
Unit review 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 Facilities Management 2008 NOS: FM308. Asset Skills

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)	Asset Skills
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	Restricted to ILM
Units available from	01/09/2008
Unit guided learning hours	12
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Range of buildings, owned or leased, whether the portfolio meets the business requirements • The benefits and disadvantages of being a tenant and an owner-occupier (for example behaviour, costs, duties, responsibilities, flexibility) • Basics of property law (landlord and tenants act, occupiers liability, defective premises, planning) • Purpose of having a property register (for example types of buildings, location, size, rent, covenants)
2	<ul style="list-style-type: none"> • Building surveys and inspections to identify assets and their condition • Types of building services (for example lifts, power supply, lighting, heating, air conditioning) • Types of fabric components (for example walls, roofs, car-parks, windows, partitioning, stairs) • Purpose of a building asset register (identifies ownership, warranty, cost etc) • Ongoing maintenance activities and their prioritisation (include resources for activities) • Types of maintenance regimes (planned preventative maintenance (PPM), fix on fail, condition based etc) • Factors to consider when developing maintenance plans and schedules (labour, skills, materials, access, legislation, location, environment, minimising downtime and deterioration, optimising performance) • Benefits of a computerised maintenance management system (for example personal digital assistants (PDAs), radio frequency identification devices (RFIDs), bar coding, industry known systems)

Title:	Introduction to the effective management of space within own organisation (M3.39)	
Level:	3	
Credit value:	3	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the principles that guide and the legislation that impacts on the planning and management of space	1.1 Briefly explain the key concepts and principles of space planning and management 1.2 State the relevant legislation that impacts on space management activities in own organisation
2	Understand how to plan accommodation changes	2.1 Describe the management and implementation of a space management project 2.2 Effectively interpret a space layout drawing 2.3 List attributes that have to be updated on completion of a space management project
3	Understand optimisation of space utilisation	3.1 List examples of ways that space is used in own organisation and briefly explain how it could be better utilized 3.2 Describe how to encourage responsible space occupancy
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of the effective management of space in own organisation.
Unit review 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 Facilities Management 2008 NOS: FM 323
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)	Asset Skills
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	Restricted to ILM & WAMITAB
Units available from	01/09/2008
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Key concepts of space planning and space management • Space allocation guidelines or policies • Measurement of space (gross, net, usable) • Space planning tools (for example computer aided design (CAD) systems) • Legislation (Workplace Regulations, Disability Discrimination Act (DDA))
2	<ul style="list-style-type: none"> • Space management projects (for example briefs, block plans, layout plans, time-scale, enabling moves, churn) • Interpretation of space layout drawings (for example furniture layouts, distances, corridors, fire-routes, building structures and building services, adjacencies) • Attributes that have to be updated (for example name, department, location, assets)
3	<ul style="list-style-type: none"> • Ways of using space (for example storage, laboratory, library, meeting, collaboration, residential, retail, production, training) • New ways of using space (for example sharing, home-working, “hotelling”, clubbing) • Space occupancy and utilisation measures (for example hours of working, amount of space per person, head count) • Space costs and measures (for example – cost per square foot or metre, overhead or cost-centre, cost per person)

Title:	Understanding support services operations (M3.40)
Level:	3
Credit value:	3
Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the range of support services required by the organisation and the legislation that impacts on these services	1.1 Describe the range of support services that is required by own organisation and identify the legislation that impacts on these services
2 Know what support services are and how they are currently being provided and delivered	2.1 Describe the role of service level agreements, their structure and format and how they are used with both customers and suppliers in own organisation 2.2 Briefly describe what support services are currently being provided by the facilities management department and how these are delivered
3 Understand the options of delivering support services	3.1 Explain various ways of providing support services to meet organisational requirements 3.2 Explain how the quality of support services is measured and monitored
Additional information about the unit	
Unit purpose and aim(s)	To develop an understanding of support services operations.
Unit review 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 Facilities Management 2008 NOS: FM305, FM317
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)	Asset Skills

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	Restricted to ILM and WAMITAB
Units available from	01/09/2010
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Knowledge and understanding of the products or services required by the organisation (for example location, resources available to pay for it, image, constraints of physical buildings) • Requirements of occupants of buildings in terms of the support they need to function effectively (for example catering services, waste disposal, reprographics, postal services, visitor management) • Awareness of new trends in support service operations (for example scanning of post, use of micro-fibers for cleaning, healthy eating, employer of choice campaigns, daytime cleaning) • Relevant legislation (for example Working Time Regulations, Workplace Regulations, Private Security Industry Act, Transfer of Undertakings for the Protection of Employment (TUPE), Environmental Legislation)
2	<ul style="list-style-type: none"> • Awareness and understanding of service level agreements, their structure and format and how they are used both with customers and suppliers • Interpretation of formal agreements with clients and customers for the delivery of services • Customer service procedures (for example help desk operations, how to log customer information, how to initiate service calls, how to close jobs <ul style="list-style-type: none"> ▪ Authorisation procedures (e.g. how to confirm caller identity, how to validate requests); ▪ Escalation, resolution and complaint handling; ▪ Quality assurance procedures; ▪ Compliance with relevant legislation and regulations (eg. Health and Safety at Work Act); ▪ Maintenance and communication of facilities management/department brand or image • Range of support services (for example cleaning, catering, security, reception, fitness, reprographics, administration)

3	<ul style="list-style-type: none">• Range of delivery options (for example in-house, contract, partner, self-perform, joint-venture)• Performance measurement and monitoring tools (key performance indicators (KPIs), inspections, audits, customer surveys, visual management, in-house incident records, helpdesk reports)
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Title:	Managing sustainability and environmental issues (M3.41)	
Level:	3	
Credit value:	3	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand sustainability and corporate social responsibility	1.1 Explain the terms sustainability and corporate social responsibility and the legislation associated with these concepts
2	Understand environmental issues affecting the organisation and how these issues can be managed	2.1 List the environmental standards required in own organisation 2.2 Explain the environmental issues affecting own organisation 2.3 Describe ways to manage issues affecting own organisation in an environmentally friendly way
3	Understand the constraints and opportunities of an organisation's building(s) in being environmentally friendly	3.1 Explain the constraints of own organisation's building(s) on environmentally friendly procedures and practices 3.2 Explain the opportunities to enhance own organisation's building(s) environmentally friendly performance
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of managing sustainability and environmental issues.
Unit review 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 Facilities Management 2008 NOS: FM311
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)		Asset Skills

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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	12
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> Legislative requirements in terms of minimising environmental impact and damage Explanation of sustainability and corporate social responsibility and how these relate to the role of the facilities manager
2	<ul style="list-style-type: none"> Types of environmental issues (for example pollution, climate change, responsible waste management, biodiversity) Impacts of environmental issues on organisations Relevant regulatory and legislative requirements (for example Duty of Care, Licensed Waste Contractors) Environmental standards (for example ISO14001) Methods for minimising environmental impact and damage during work The most suitable choice of materials and equipment given the nature of the work activity, and its potential impact on the environment Ways in which tools and materials should be used in order to minimise environmental impact and damage Types of damage which may occur, the impact these can have on the environment, and the corrective actions to be taken Methods of waste disposal which will minimise the risk to the environment, people and business How to recognise and deal with small scale environment incidents Procedures in place for dealing with environmental incidents The role of facilities management in environmental incidents
3	<ul style="list-style-type: none"> Constraints of building(s) on environmentally friendly procedures and practices (for example type of heating and cooling, structure of roof, level of insulation, solar gain) Opportunities to enhance buildings' environmentally friendly performance (for example alternative sources of energy, re-use of building materials, natural ventilation, energy performance certificates)

Title:	Managing utility services and energy efficiency in the workplace (M3.42)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand own organisation's utility services requirements	1.1 Explain what utility services are required by own organisation and examine what is actually provided 1.2 Explain the options of acquiring utility services to bridge the gap between own organisation's requirements and actual provision
2	Understand the efficiency of own organisation's energy consumption	2.1 Explain the importance of energy management for own organisation 2.2 Examine how own organisation measures energy requirements and actual consumption to determine efficiency 2.3 Identify ways of improving own organisation's energy efficiency
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of managing utility services and energy efficiency.
Unit review 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 Facilities Management 2008 NOS: FM324
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)		Asset Skills
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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Range of utility services (for example gas, water, electricity, oil, solid fuel, bio-mass, geothermal) • Ways of supplying utility services (for example based on location, range of suppliers, national contracts, tariffs, combined heat and power) • Various options of acquiring utility services (for example re-negotiation of supply and tariffs, wind-turbines, photo-voltaic, grey-water systems, renewables) • Ways of conserving utilities (for example use of building management systems, presence detectors) • Alternative ways of improving utility usage
2	<ul style="list-style-type: none"> • The importance of energy management and the role of the facilities manager in this (Company Energy Policy, Energy Performance Certificates) • Sources of expertise in relation to energy management (for example The Carbon Trust) • Existing systems for monitoring, measuring and reporting on energy matters • Improving energy efficiency (meters, targets, awareness campaigns) • Communication channels for making recommendations and suggestions to improve energy efficiency • The importance of setting a good example to others in relation to energy management

Title:	Understanding procurement and supplier management in the workplace (M3.43)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Understand procurement in own organisation	1.1 Examine and explain relevant procurement procedures in own organisation 1.2 Describe how procurement requirements can be identified and validated 1.3 Give an example of typical purchases in own area of responsibility 1.4 Give an example of a supply chain in own organisation 1.5 Describe types of specifications used in the organisation	
2 Understand how specialists and suppliers are identified and managed in own organisation	2.1 List specialists and suppliers used by own organisation and explain how these specialists and suppliers are selected 2.2 Briefly explain how the performance of specialists and suppliers is monitored and how continuous improvement is encouraged	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of procurement and supplier management.	
Unit review 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 Facilities Management 2008 NOS: FM314, FM326	
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)	Asset Skills	

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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Procurement procedures (for example purchase orders, requisitions, specifications, terms and conditions, authority levels, payment terms) • Identify sources of supply and procurement needs (for example demand analysis, make-or-buy, lease-or-rent decisions, re-use/recycle) • Awareness of relevant legislative and ethical compliance issues • Specifications (input, output and function) • Examples of typical facilities management procurement activities (for example stationary, furniture, uniforms, equipment) • Examples of supply chains
2	<ul style="list-style-type: none"> • Range of specialists and suppliers in facilities management sector and organisations • Selection and appointment processes • Performance and monitoring of suppliers and specialists working with organisations

Title:	Understanding facilities management within the context of an organisation (M3.44)	
Level:	3	
Credit value:	4	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Have an appreciation of trends within facilities management	1.1 Examine and explain trends within facilities management and identify a potential trend that may benefit own organisation	1.2 Examine and describe which organisations are considered to be market leaders in terms of facilities management
2 Understand the importance of facilities management within the context of own organisation	2.1 Briefly define the role of the facilities manager	2.2 Briefly describe the organisation's purpose, its culture, its performance goals and objectives and explain how facilities management can assist the organisation in achieving its purpose
	2.3 Briefly describe the organisational structure and explain how facilities management operates within it	2.4 Briefly explain possible consequences of poor and ineffective facilities management
	2.5 Briefly reflect on own ability to influence others to accept both popular and unpopular facilities management actions within the context of own organisation	
3 Know how to set team and individual objectives that will ensure effective facilities management in own organisation	3.1 Set team and individual objectives that will ensure effective facilities management to support organisational performance	3.2 Describe the structure of the facilities management department in which they work
4 Know what external factors could affect facilities management within an organisation	4.1 Give examples of external factors that could affect facilities management within an organisation	

<p>5 Be able to raise the profile of facilities management in the organisation and local community</p>	<p>5.1 Explain ways that they could raise the profile of facilities management</p> <p>5.2 Examine own organisation's locality and functions within the context of the local community and identify ways of building relationships that enhance the organisation and contribute towards social responsibility targets set by own organisation</p> <p>5.3 Reflect on ways that they could personally raise the profile of their facilities management role</p>
<p>Additional information about the unit</p>	
<p>Unit purpose and aim(s)</p>	<p>To develop knowledge and understanding of facilities management within the context of an organisation.</p>
<p>Unit review date</p>	<p>31/12/2014</p>
<p>Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)</p>	<p>Links to Facilities Management 2008 NOS: FM301</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from a sector skills council or other appropriate body (if required)</p>	<p>Asset Skills</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>Business Management</p>
<p>Name of the organisation submitting the unit</p>	<p>Institute of Leadership & Management</p>
<p>Availability for use</p>	<p>Restricted to ILM and WAMITAB</p>
<p>Units available from</p>	<p>01/09/2008</p>
<p>Unit guided learning hours</p>	<p>18</p>

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Trends within facilities management (for example outsourcing, public private partnerships, convergence and integration of technologies in the built environment, consolidation of services, infrastructure management, hotelling, ever increasing customers expectations) • Sources of information about facilities management organisations and services
2	<ul style="list-style-type: none"> • Defining the role of the facilities manager • Different types of organisations and their purposes and culture (for example public sector, not for profit, non governmental, private, owner managed) • Finding and being able to identify organisational goals and objectives • The role that facilities management could play in assisting organisational goals and objectives to be achieved • Identifying and understanding organisational structures (hierarchical, matrix, regional, entrepreneurial) • Types of facilities management structures and how these fit within the larger organisational structure • Possible consequences of poor and ineffective facilities management • Examples of proactive and effective facilities management; and examples of ineffective facilities management • Reflect on own ability to persuade and influence a range of stakeholders including decision-makers in an organisation
3	<ul style="list-style-type: none"> • Setting departmental and individual objectives to support organisational performance objectives (for example specific, measurable, achievable, realistic time bound (SMART) criteria/objectives) • Example of business plans, showing how objectives can help an organisation to achieve its purpose • Various types of departmental structures that organisations may use • Different types of resources and their effective allocation (for example manpower, skills, finance, technology, space, equipment) • Effective workload management
4	<ul style="list-style-type: none"> • Using basic management tools to analyse factors (for example political, economic, social, technological, legal, environmental (PESTLE) and strengths, weaknesses, opportunities, threats (SWOT) • Examples of external factors that could effect facilities management within an organisation (for example natural and manmade catastrophes, the economic and political environment, demographics, societal values, globalisation, scarcity of natural and manmade resources) • A basic appreciation of change management principles • Examples of how structures could be modified to cope with various changes

5	<ul style="list-style-type: none">• Ways to raise the profile of facilities management (for example professional conduct, being a role-model, being willing to listen, engage in further career development, being honest and trustworthy, being willing to explore feasible alternative options, pride for a job well done, accepting responsibility, giving attention to detail, ensuring that others can get on with their jobs)• Encouraging systems thinking so that the facilities manager can make the link between an organisation's locality, its functionality and how this could be used to build relationships and contribute towards social responsibility targets (for example apprenticeships, volunteering, work experience, matched-giving, recycling, donations)• Simple reflective statements (what they did, how well they performed, how they could improve, further development actions required)
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Title:	Managing and developing relationships in the workplace (M3.45)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Examine the needs and expectations of others	1.1 Identify and examine the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace 1.2 Explain the importance of knowing what customers, colleagues, key stakeholders and relevant others in the workplace require
2	Meet the needs and expectations of others	2.1 Determine ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace within organisational constraints 2.2 Explain ways of checking that the needs and expectations of others have been met
3	Be able to manage relationships where it is not possible to meet the need or expectations of others	3.1 Examine and explain ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of Managing and developing relationships in the workplace.
Unit review 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 Facilities Management 2008 NOS: FM302
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)	Asset Skills
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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Explanation of stakeholders and stakeholder analysis • Identify ways of determining the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace (for example surveys, interviews, focus-groups, feedback, suggestion boxes, comment cards) • Ways of examining/validating that identified needs and expectations are relevant • The benefits of knowing what relevant others require
2	<ul style="list-style-type: none"> • Ways of meeting the needs and expectations of relevant others (active and effective listening, clear, accurate and relevant communication; understanding of their environment/situation, progress reporting, feeding back, timely delivery of the correct requirement) • Principles of effective communication • Ways of checking that the needs and expectations have been met (for example feedback, surveys, mystery shop, meetings, complaints and compliments, internal records)
3	<ul style="list-style-type: none"> • The importance of establishing trust and confidence • Ways of managing relationships where it is not possible to meet the needs of others (for example good communication, possible alternative solutions, possible future alternatives, informing superiors, clear explanation as to why it is not possible to meet the needs, building trust and confidence by being open, honest and transparent, being willing to listen, exploring all options and giving a clear rationale, politeness and courtesy, being customer focussed) • Principles of effective communication • Basic knowledge of negotiation and consultation skills • Basic knowledge of conflict management and problem solving

Title:	Managing contracts and contractors in the workplace (M3.46)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand how contracts are managed in the workplace	1.1 Briefly outline contract management procedures and tools used in own workplace 1.2 Give an example of a contract that they assist in managing and explain how they do this
2	Understand how contractors can be managed in the workplace	2.1 Explain how to communicate all relevant information to contractor(s) in the workplace 2.2 Give an example of a contractor that they manage and explain what information the contractor will require to perform their function safely 2.3 Using the example they have provided explain a control tool that they could use to monitor the contractors work 2.4 Using the example they have provided explain how they could stop a contractor working if the work were unsafe, unauthorised or causing business disruption
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of managing contracts and contractors in the workplace.
Unit review 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 Facilities Management 2008 NOS: FM326
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)	Asset Skills
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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Basic awareness of contract law (the importance of agreement between two parties) • Types of contracts (for example Fixed Price, Measured Term, Framework) • Contract management procedures and tools (contract reviews, compliance audits, customer surveys, meetings, service level agreements, regular reports) • Basic awareness of the scale and scope of contracts (regional, national or global) • Basic awareness of the monitoring and evaluation of contracts including penalties and rewards for delivery • Basic awareness of the stages of commissioning or mobilizing new contracts (for example enabling works, site access, documentation, transfer of staff, training, induction) (learners may be part of a team doing this, or expected to be able to work in a team doing this)
2	<ul style="list-style-type: none"> • Examples of types of relevant information required by contractors (for example fire, safety, code of conduct, accident reporting, hours of work, safety equipment, emergency arrangements) • Types of contractors commonly used in the workplace (for example photo-copy engineers, water cooler distributor, decorator, internal landscaping operatives, food seller and distributor, lift engineers, maintenance contractors, specialist cleaning contractors) • Examples of control tools (permit to work, risk assessment, method statement, security ID, access control, insurance) • Ways to stop contractors from working under certain conditions (for example communication, confiscate equipment under extreme conditions, switch off equipment, close off area, de-activate work permit, withdraw access)

Title:	Delivering service in the workplace (M3.47)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Be able to deliver service in the workplace	1.1 Identify a facilities management service that must be delivered in the workplace	1.2 Plan the delivery of the facilities management service identified including all resource requirements
	1.3 Explain how the delivery of the facilities management service identified will be communicated to others	
2 Understand how to collect feedback and evaluate service delivery in the workplace	2.1 Explain how they would collect and evaluate feedback from relevant others about the facilities management service identified and planned	
3 Understand how to monitor the service delivery activity to ensure continuous improvement	3.1 Explain what tools they would use to continuously monitor the effective delivery of facilities management services to ensure continuous improvement	
Additional information about the unit		
Unit purpose and aim(s)	To develop knowledge and understanding of delivering service in the workplace.	
Unit review 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 Facilities Management 2008 NOS: FM301, FM305, FM309	
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)	Asset Skills	
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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Identification of facilities management services • Effective planning and organisational techniques/tools/methods • Resource requirements within facilities management • Ways of communicating effectively
2	<ul style="list-style-type: none"> • Ways of collecting and evaluating feedback from others about service delivery (questionnaires, surveys, comment cards, verbal feedback, electronic feedback) • Ways of dealing with feedback that identifies significant problems and issues in the delivery of the facilities management services
3	<ul style="list-style-type: none"> • Explanation of continuous improvement • Tools and techniques for monitoring effective delivery of services (for example complaint log books, analysis of help-desk fault reports, analysis of down-time of equipment, analysis of incidents etc)

Title:	Understanding incident management and disaster recovery in the workplace (M3.48)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand risk assessment and potential hazards and risks in the workplace	1.1 Explain the process of risk assessment 1.2 Describe potential hazards and incidents that could occur in own workplace 1.3 Describe potential outcomes if hazards and incidents are not managed
2	Understand how to reduce the impact of hazards on people and the organisation	2.1 Explain how to reduce the impact of hazards on people and the organisation 2.2 List mitigation measures used to prevent incidents in the organisation 2.3 Describe monitoring and review processes that are used in own organisation
3	Understand how to recover after an incident has occurred in the workplace	3.1 Explain the recovery procedures in own organisation 3.2 Describe an incident that could occur in own workplace and explain their role should this incident occur
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of incident management and disaster recovery in the workplace.
Unit review 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 Facilities Management 2008 NOS: FM320
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)		Asset Skills

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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Explanation of risk management (for example risk assessment, risk analysis, 5 steps) • Identify a range of hazards and their consequences • Identify the people and their business processes that could be effected by potential hazards • Identify typical facilities management incidents (for example someone tripping on a slippery floor etc)
2	<ul style="list-style-type: none"> • Explanation of risk mitigation (for example training, insurance, outsourcing, communication, prevention controls, good housekeeping) • Risk assessment record keeping and reviews (for example new staff, new equipment, new location, new processes, after incident)
3	<ul style="list-style-type: none"> • Explanation of business continuity and disaster recovery planning (suggest that tutors work through examples and case studies) • The role of facilities management in business continuity or disaster recovery teams

Title:	Understanding security measures in the workplace (M3.49)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand security measures in the workplace and associated legislation	1.1 Identify and explain security measures in own organisation and workplace 1.2 Briefly describe relevant legislation affecting security measures in the workplace
2	Know whether the prescribed security measures are effective in the organisation	2.2 Examine the effectiveness of prescribed security measures in the organisation and workplace 2.3 Identify potential weaknesses between prescribed security measures and what happens in reality
3	Know how to identify improvements to existing security measures	3.1 Based on the most important potential weaknesses identified propose appropriate improvements to security measures
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding effective security measures in the workplace.
Unit review 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 Facilities Management 2008 NOS: FM307
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)		Asset Skills
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	Restricted to ILM and WAMITAB
Units available from	01/09/2008
Unit guided learning hours	8
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Explanation of security measures in organisation and workplace affecting people, place and business (for example access control, restricted areas, identification systems, protective clothing, locks and safes, authorisation procedures, patrolling, employee checks, close circuit television (CCTV), passwords, fire-walls, anti-virus software checks, document protection systems, confidential waste management, data protection and security) • Relevant legislation (for example Data Protection Act, Human Rights, The Regulation of Investigatory Powers, Computer Misuse Act, Private Security Industries Act)
2	<ul style="list-style-type: none"> • Identify limitations and restrictions in a range of security measures and arrangements • Identifying gaps between requirements and reality • Prioritisation of weaknesses
3	<ul style="list-style-type: none"> • Explanation of improving existing or providing alternative security measures and arrangements (for example new technology such as biometrics)

Title:	Understanding advanced site waste management (M3.51)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Know the steps in the development of site waste management plan legislation	1.1	Recall the steps in the development of site waste management plan legislation
2 Know the duties and responsibilities of key players to ensure compliance with the site waste management plan regulations	2.1 2.2	Explain the duties and responsibilities of the client, principal contractor and sub-contractors to ensure compliance with the site waste management plan regulations List the potential offences for non-compliance with the site waste management plan regulations
3 Know the benefits of site waste management plan	3.1	List the main benefits of site waste management plan
4 Know the key elements of a site waste management plan	4.1 4.2 4.3	List the requirements for projects valued between £300,000 and £500,000 List the requirements for projects valued above £500,000 List the requirements for the final report (within three months of completion)
5 Know where to find additional information for environmental and waste best practice on site	5.1	List sources of additional information for environmental and waste best practice on site
Additional information about the unit		
Unit purpose and aim(s)	To provide learners with an understanding of site waste management.	
Unit review date	31/12/2014	
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		

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)	
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	Restricted to ILM and WAMITAB
Units available from	01/11/2008
Unit guided learning hours	3
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> History and evolution of site waste management plan legislation including codes of practice, consultations, responses to consultations, draft regulations, government guidance etc
2	<ul style="list-style-type: none"> The duties and responsibilities of key parties including the client, principal contractor and sub-contractors as required by the legislation The potential offences for non-compliance with legal requirements The enforcing bodies
3	<ul style="list-style-type: none"> The importance for site waste management plans The costs and the benefits to the company and the environment of implementing site waste management plans
4	<ul style="list-style-type: none"> The Requirements of a site waste management plan for projects valued above the various thresholds detailed in the legislation The requirements for final reporting of site waste management plans as detailed in the legislation
5	<ul style="list-style-type: none"> Sources of information on waste best practice including Environment Agency, Waste Aware Construction, Waste Resources and Action Programme (WRAP)

Title:	Writing a site waste management plan (M3.52)	
Level:	3	
Credit value:	5	
Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1 Produce a Site Waste Management Plan to meet the requirements of the SWMP regulations	1.1 Identify the required project information (before work commences on the site) 1.2 Identify all subcontractors 1.3 List all waste streams arising on site 1.4 Estimate waste volumes for each waste stream 1.5 Establish targets to reduce, re-use, recycle waste arising on site	
2 Demonstrate compliance with the Duty of Care Regulations	2.1 Identify all waste contractors and record all checks necessary to ensure legal compliance 2.2 Ensure all Waste Transfer Notes contain the required information 2.3 Explain arrangements for correct storage of records	
Additional information about the unit		
Unit purpose and aim(s)	To provide learners with the knowledge and skills to write a site waste management plan.	
Unit review 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 Construction Skills 2007 NOS: VR 465	
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)	Construction Skills	
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	Restricted to ILM
Units available from	01/11/2008
Unit guided learning hours	4
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Summary of project information as required by the current waste legislation • All subcontractors working on site • Identify all waste streams that will arise on site • Document estimated volumes for each waste stream arising on site • Establish targets for each waste stream against each stage of the waste hierarchy
2	<ul style="list-style-type: none"> • List all waste contractors use on site • Check waste carriers' licences contain all information required by the relevant legislation • Check waste carriers' licence details with the environment agency • Confirm all Waste Transfer Notes contain all information required by the relevant legislation • Arrangements for storage of records are appropriate

Title:	Implementing a site waste management plan (M3.53)	
Level:	3	
Credit value:	6	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Make provision for material storage	1.1 Demonstrate adequate arrangements are in place for material storage to minimise risk of damage
2	Make provision for waste disposal	2.1 Demonstrate adequate arrangements are in place for waste disposal from site (e.g. segregate) 2.2 Establish signage as required
3	Communicate the site waste management plan to staff working for, and on behalf of, the organisation	3.1 Ensure the site waste management plan is available to all who work on site 3.2 Communicate the requirements of the site waste management plan
4	Train relevant staff on requirements of the site waste management plan	4.1 Ensure the site waste management plan is included in the site induction 4.2 Provide additional training as needed to ensure all work on site is carried out within the terms of the site waste management plan
5	Reduce, re-use, recycle and recover waste where practicable	5.1 Record waste disposed of from site, including waste description (inc. EWC), volume, destination, waste management option, and demonstrate this waste has been reduced, re-cycled and recovered where practicable
6	Regularly review the site waste management plan	6.1 Compare progress against targets 6.2 Revise the plan on a regular basis
7	Evaluate legal compliance on site	7.1 Complete an environmental audit on site 7.2 Evaluate compliance with legislation
8	Make arrangements for continual improvement	8.1 Develop an action plan to include recommendations for improvement

9	Know the requirements for security measures	9.1	Provide sufficient security measures on site to prevent illegal disposal of waste from site
Additional information about the unit			
Unit purpose and aim(s)		To provide learners with the knowledge and skills to implement a site waste management plan.	
Unit review 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 Construction Skills 2007 NOS: VR 465	
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)		Construction Skills	
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		Restricted to ILM	
Units available from		01/11/2008	
Unit guided learning hours		4	
Additional Guidance about the Unit			
Indicative Content:			
1	<ul style="list-style-type: none"> Waste is correctly stored on site 		
2	<ul style="list-style-type: none"> Arrangements have been made for waste disposal that meets the requirements of the relevant legislation Clear information relating to correct methods of segregation and disposal are available on site e.g. posters, signage etc 		

3	<ul style="list-style-type: none"> • The site waste management plan is safely stored and is available to all on site • The site waste management plans communicated effectively to all on site (eg. via toolbox talks, meetings, posters, presentations etc)
4	<ul style="list-style-type: none"> • The site waste management plan is part of the site induction process • Adequate training is provided where appropriate on the implementation of the site waste management plan (eg. toolbox talks, waste training, higher level specialist waste or environmental training)
5	<ul style="list-style-type: none"> • Adequate records of waste disposal or other waste management option are maintained and available for inspection • The records of waste disposal or other waste management option contain all information required to meet the requirements of the legislation • All records are filed for future reference
6	<ul style="list-style-type: none"> • Progress of the site waste management plan has been reviewed against targets set • The site waste management plan has been revised as required following a review
7	<ul style="list-style-type: none"> • There is documented evidence of evaluation of compliance
8	<ul style="list-style-type: none"> • A Specific, Measurable, Achievable, Responsibility assigned and Time bound (SMART) action plan has been developed for continual improvement
9	<ul style="list-style-type: none"> • Adequate security measures are in place to minimise the risk of pollution of the environment or breach of environmental legislation

A P P E N D I X - B

ASSESSMENTS FOR MANDATORY UNITS FOR THE ILM LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT

CHANGE MANAGEMENT REPORT: M3.02; M3.03; M3.04

Centre Number:	Centre Name:	
Learner Registration No:	Learner Name:	
<p>Examine factors that may require your organisation to change, and identify a change required in the workplace that will benefit the organisation. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.</p> <p>You should discuss the choice of topic and an outline of your submission with your line manager and/or your tutor. The choice of topic must allow you to demonstrate achievement of assessment criteria from the units studied. It should not be a very large or complex topic, but it must offer scope for planning change – perhaps it is a change in working methods, customer service or working relationships.</p> <p>Task</p> <p>Write a report to your line manager about a change that is needed which could be implemented in the near future. The 'nominal' word count for this assignment is 2000 words: the suggested range is between 1500 and 3000 words.</p>		
<i>Please use the headings shown below when writing up your Report</i>	Assessment Criteria	
<p>Introduction / Background</p> <p>In order to provide a context, briefly describe your organisation, what it does, and your role within it.</p> <p>Give a few examples of what is measured in your area of work that will determine whether your products or services are acceptable.</p> <p>Briefly explain why quality and continuous improvement are important for your workplace. What would happen in your area of work if quality standards were allowed to slip?</p> <p><i>(min 5 marks required from 10 available)</i></p>	<ul style="list-style-type: none"> • Context for report is provided • The organisation's quality standards are identified • The importance of quality awareness and the need to continuously improve the organisation is explained 	
<p>Identify a change that is required</p> <p>Carry out a simple SWOT or PESTLE analysis to examine the business environment in which your organisation operates.</p> <p>As a result of your better understanding of the environment, identify one change required in your workplace to make things better.</p> <p>This change could be initiated by you or by someone in higher authority.</p> <p>Explain how the organisation will benefit from this proposed change.</p> <p><i>(min 8 marks required from 16 available)</i></p>	<ul style="list-style-type: none"> • Forces that may require change in the organisation are identified by conducting a simple SWOT and/or PESTLE analysis • An example is given of change required in the workplace reflecting the SWOT and/or PESTLE analysis • The benefits of innovation and change for the organisation are explained 	
<p>Planning and monitoring the change</p> <p>Prepare an action plan for implementing the change. Your action plan should include objectives that are Specific, Measurable, Acceptable, Realistic and Time-bound. The objectives should be listed in order of priority. The action plan should indicate</p> <ul style="list-style-type: none"> • what has to be done, 	<ul style="list-style-type: none"> • SMART objectives are set, listed in order of priority and appropriate time scales set for their achievement • Objectives are planned using 	
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<ul style="list-style-type: none"> • who will do it, • when it will be done, • where it will be done; and • also what resources will be needed <p>Example of objectives could include things such as reducing cost, speeding up production or minimising waste.</p> <p>In order to ensure that what was planned actually happens, explain how progress would be monitored to ensure the change is achieved.</p> <p><i>(min 15 marks required from 30 available)</i></p>	<p>an established time management technique</p> <ul style="list-style-type: none"> • A technique for planning change within the context of the example given is used • The monitoring technique for any objective is explained
<p>Implications of the change</p> <p>Identify and explain what the proposed change will cost and its financial effects.</p> <p>Identify those who will be affected by the change and explain how this will affect them.</p> <p>What could you do to overcome any objections or resistance to the proposed change?</p> <p><i>(min 12 marks required from 24 available)</i></p>	<ul style="list-style-type: none"> • Relevant human and financial factors in the consideration of change are identified • Possible human and financial effects of change upon people, departments and the organisation is explained • Constraining or limiting factors that could hinder the achievement of any one objective are identified • The barriers to change and innovation in the workplace and practical ways of overcoming these are explained
<p>Communicating and implementing the change</p> <p>Introducing the change will not be the end of the matter. You will have to tell people about the change. Identify and explain:</p> <ul style="list-style-type: none"> • who needs to know about the change • how you will tell them; and • why it is important to tell them <p>Briefly explain how you will continue to improve once the change has been completed. What tool could you use to monitor continuous improvement?</p> <p>Briefly explain how you will involve the team in quality and improvement matters.</p> <p><i>(min 10 marks required from 20 available)</i></p>	<ul style="list-style-type: none"> • Communication with and involvement of people to facilitate effective change are explained • The importance of communication in successful implementation of change is explained • Ways of involving the team in quality and continuous improvement are explained • A continuous improvement tool or technique relevant to the workplace is used • Ways to evaluate continuous improvement activities are discussed
<p>By submitting I confirm that this assessment is my own work</p>	

MARK SHEET: M3.02, M3.03, M3.04: CHANGE MANAGEMENT REPORT

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Introduction / Background <ul style="list-style-type: none"> Context for report is provided The organisation's quality standards are identified The importance of quality awareness and the need to continuously improve the organisation is explained 			/ 10 marks (min 5)	
Identify a change that is required <ul style="list-style-type: none"> Forces that may require change in the organisation are identified by conducting a simple SWOT and/or PESTLE analysis An example is given of change required in the workplace reflecting the SWOT and/or PESTLE analysis The benefits of innovation and change for the organisation are explained 			/ 16 marks (min 8)	
Planning and monitoring the change <ul style="list-style-type: none"> SMART objectives are set, listed in order of priority and appropriate time scales set for their achievement Objectives are planned using an established time management technique A technique for planning change within the context of the example given is used The monitoring technique for any objective is explained 			/ 30 marks (min 15)	
Implications of the change <ul style="list-style-type: none"> Relevant human and financial factors in the consideration of change are identified 				

<ul style="list-style-type: none"> • Possible human and financial effects of change upon people, departments and the organisation is explained • Constraining or limiting factors that could hinder the achievement of any one objective are identified • The barriers to change and innovation in the workplace and practical ways of overcoming these are explained 			/ 24 marks (min 12)	
<p>Communicating and implementing the change</p> <ul style="list-style-type: none"> • Communication with and involvement of people to facilitate effective change are explained • The importance of communication in successful implementation of change is explained • Ways of involving the team in quality and continuous improvement are explained • A continuous improvement tool or technique relevant to the workplace is used • Ways to evaluate continuous improvement activities are discussed 			/ 20 marks (min 10)	
Assessor's decision		Quality assurance use		
Total marks	Outcome <i>(circle as applicable)</i>	Total marks	Outcome <i>(circle as applicable)</i>	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		
Assessor signature and date:		IQA signature:		
ILM EV signature:		Date externally verified (where applicable):		

MARK SHEET – REFLECTIVE REVIEW - M3.10 INTRODUCTION TO LEADERSHIP

Centre Number:	Centre Name:			
Learner Registration No:	<p>1. Learner named below confirms authenticity of submission.</p> <p>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.</p> <p>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/></p>			
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
<p>Leadership styles</p> <ul style="list-style-type: none"> The factors that will influence your choice of leadership styles or behaviours in workplace situations are identified The reason why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour is explained 			/60 marks (min 30)	
<p>Review of own leadership behaviour</p> <ul style="list-style-type: none"> Own leadership behaviours and potential is 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 			/40 marks (min 20)	
Assessor's decision		Quality assurance use		
Total marks	Outcome <i>(circle as applicable)</i>	Total marks	Outcome <i>(circle as applicable)</i>	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		

Name of assessor:	Name of IQA:
Assessor signature and date:	IQA signature:
ILM EV signature:	Date externally verified (where applicable):

A P P E N D I X - C

SUGGESTED OPTIONAL UNITS ASSESSMENTS FOR THE ILM LEVEL 3 CERTIFICATE IN EFFECTIVE MANAGEMENT

M3.01

Solving problems and making decisions**TASK**

Identify a workplace problem facing you or your team (or a team within another organisation if you are currently unemployed) and examine ways to resolve it.

For the purposes of this assignment, 'problem' may be interpreted as 'a deviation from the norm' OR 'an improvement opportunity' OR 'a potential or anticipated problem'.

The 'nominal' word count for this assignment is 1200 words: the suggested range is between 1000 and 2000 words.

Check your assignment carefully prior to submission using the assessment criteria.

Assessment Criteria

- Describe a problem, its nature scope and impact
- Gather and interpret information to identify possible solutions to a problem
- Briefly summarise the options, providing facts and evidence, not just opinion
- Use at least one simple decision making technique to evaluate options to arrive at the best solution
- Plan the implementation and communication of the decision
- Briefly discuss which monitoring and review techniques could be used to evaluate outcomes

M3.05	Writing for business
<p><u>Report</u></p> <p>Write a report on a management problem that has been agreed with your tutor. If you use the content of another unit as your topic, then the assessment criteria for both units apply.</p> <p>Your report should include the headings shown in bold and basic statistics and visual material, either in the content or in an appendix. Use an appropriate tone, language and level of formality in your report</p> <p>Background Briefly describe the organisation, what it does and your role within it</p> <p>Introduction Write an introduction that includes some or all of the following: <ul style="list-style-type: none"> A brief description of a management problem The background, circumstances or history of your topic Any explanations where necessary </p> <p>Investigation (or Methodology) Investigate the problem and identify possible solutions to the problem. Use basic statistics and visual material in the content or in an appendix</p> <p>Evaluation possible solutions Evaluate your options to arrive at the best solution</p> <p>Recommendations Provide a clear statement of your proposed solution and provide an action plan for implementing your recommendation</p> <p>Appropriate tone, language and level of formality Ensure that you have used suitable language, tone and level of formality in the report</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • A report is written to meet specified standards • Basic statistics and visual material is included in the content or in an appendix • Effective and appropriate tone, language and level of formality is used in the report 	

M3.06	Managing creativity and innovation in the workplace
<u>Work-based Assignment</u>	
Creativity and Innovation	
<ul style="list-style-type: none"> • Lead a group of people in generating creative ideas relevant to your workplace, employing an appropriate technique. Having done this, review your own performance and the ideas that were generated, and identify anything you would do to improve the process in future. Your review should consider: • How effective the technique was in encouraging creative ideas • Any barriers to creative thinking and resistance to innovation that were apparent • Which if any of these ideas you would like to take forward at work, and why • How you would gain the commitment of managers and others in your organisation in moving any of the creative ideas forward 	
Assessment Criteria	
<ul style="list-style-type: none"> • A technique was used to encourage creative ideas amongst team members • Barriers to creative thinking and resistance to innovation within the team is explained • Gaining the commitment of others in moving creative ideas forward is explained • Creative and innovative ideas are evaluated and reasoned recommendations made to managers and others 	

M3.07	Obtaining information for effective management
<u>Work-based Assignment</u>	
Workplace questionnaire	
Plan and prepare a simple survey in your workplace on a topic that is relevant to you and your role. In doing this you should:	
<ul style="list-style-type: none"> • Briefly gather information relating to the topic using basic data collection techniques (questions, observation, surveys, source records, etc), from external, internal and internet sources, to help you develop your questionnaire. Check the validity of the information that you gathered. • Design a simple workplace questionnaire that includes a minimum of <u>four</u> different types of questions 	
Representative sampling and administration	
Describe how you would ensure representative sampling and how you would administer your workplace questionnaire	
Evaluation of results	
Briefly describe how you would analyse the results of your questionnaire to identify the information you require	
Assessment Criteria	
<ul style="list-style-type: none"> • Information relating to the topic was gathered using basic data collection techniques from external, internal and internet sources • The validity and accuracy of information gathered was checked • Information gathered is analysed and conclusions drawn • A simple workplace questionnaire is designed that includes a minimum of <u>four</u> different types of questions • A representative sampling technique is described • The way that the questionnaire could be administered is described • A simple technique for analysing the results of the questionnaire is described 	

M3.08	Managing customer service
<p><u>Work-based Assignment</u></p> <p>Understanding basic customer service You should describe your organisation's customer service by briefly describing at least <u>two</u> legal rights of your customers, <u>two</u> of your organisation's commitments to customers and the manager's responsibilities in relation to customer service</p> <p>Caring for the customer You should also describe how your organisation cares for its customers. To do this, identify an internal and an external customer, and explain how customer service standards and procedures are used to meet their needs. In addition, explain how customer service is monitored against the standards set by your organisation</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Two legal rights of customers are described • Two of the organisations' commitments to customers are described • The managers' responsibilities in relation to customer service is described • The needs of an internal and an external customer is described • How customer needs are identified is described • The use of service standards and procedures to meet customer needs is explained • Customer service monitoring against set standards is explained 	

M3.09	Giving briefings and making presentations in the workplace
<p><u>Presentation</u></p> <p>Plan and deliver a briefing or presentation on a management topic of your choice, and collect written feedback on your performance. In doing this, you should ensure that you:</p> <ul style="list-style-type: none"> • Select appropriate information in line with your topic and objectives • Logically structure the content of your presentation/briefing • Introduce your topic clearly • Use appropriate presentation techniques and aids • Present information clearly • Display confidence in the subject matter • Keep to time • Use feedback to check understanding from your audience • Design a simple evaluation form <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Appropriate information is selected in line with the objectives of the briefing or presentation • The structure of the content of the briefing or presentation is logical • The topic is clearly introduced • Appropriate presentation techniques and aids are used • The information is presented clearly • The learner displayed confidence in the subject matter • The learner kept to the time allocated • The learner used feedback to check understanding • The learner designed a simple evaluation form 	

M3.11	Building the team
<p><u>Work-based Assignment</u></p> <p>Explain how you develop and maintain trust at work and why confidentiality is so important in building and maintaining trust at work</p> <p>Describe the difference between a group and a team using examples from your workplace to illustrate this difference</p> <p>Briefly describe the stages of an established model of group formation (using examples from your experience to illustrate these, if possible)</p> <p><i>Note: If this is not possible describe the stages of an established model of group formation</i></p> <p>Explain the benefits of knowing your team members' preferred team roles</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Behaviours which could develop and maintain trust at work are explained • The reason why confidentiality is important in building and maintaining trust in the team is explained • One example of a group and one example of a team within the workplace is given • Justification is provided for the classification of the examples given • The stages of an established model of group formation is briefly described • The way that a manager could benefit from knowing team members' preferred team roles is explained 	

M3.12	Motivating to perform in the workplace
<p><u>Work-based Assignment</u></p> <p>Describe your organisation's formal systems of assessment/appraisal, and your own informal practices. Explain the value of each and identify ways that you ensure that it is fair and objective, or suggest any changes that would ensure that it is.</p> <p>Briefly describe the factors that influence the way that people in your workplace behave and, based on this, explain how you would apply <u>one</u> recognised theory of motivation to your team to improve their performance.</p> <p>Explain why feedback is important to improve communication and the performance of your team and compare the effectiveness of different types of feedback used in your workplace</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The value of formal and informal performance assessment in the workplace is explained • Ways that could ensure fair and objective formal assessment are identified • The factors that influence how people behave at work is outlined • The application of one basic recognised theory of motivation is explained • The importance of feedback to improve communication and performance is explained • The effectiveness of different types of feedback is compared 	

M3.13	Developing yourself and others
<p><u>Work-based Assignment</u></p> <p>Using at least <u>one</u> simple technique carry out a simple development needs analysis on yourself and <u>one</u> member of your team. Also identify your own and <u>one</u> other members of the team's learning styles. Record the outcomes and briefly outline the technique you used</p> <p>Briefly analyse <u>two</u> learning/development options available to you, and <u>two</u> learning/development options available to the member of your team. Identify any barriers which might prevent any of these options being accomplished and explain how these barriers might be overcome. You should also describe support mechanisms that are available for both you and the member of your team.</p> <p>Describe how you would monitor both your own development and the team member's development.</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • At least one simple technique for identifying own development needs and the development needs of one other member of the team is used • Own learning style(s) and the learning style(s) of one other member of the team is identified • Two learning/development options to meet the need(s) of self and one other member of the team are briefly analysed • The barriers to learning are identified and an explanation given as to how these barriers can be overcome • The support mechanisms for the development of self and one other member of the team are identified • The methods used to monitor the development of self and one other member of the team is described 	

M3.14	Managing conflict in the workplace
<p><u>Reflective Review</u></p> <p>Identify a conflict situation that you directly or indirectly experienced that affected others in the workplace. Explain what may have caused the conflict, describe the stages in the development of the conflict and explain the effects of the conflict on the performance of the team and individuals at work</p> <p>Explain any recognised technique you used (or could have used) to minimise and resolve this conflict in your workplace and explain how you could create a positive atmosphere at work to minimise the adverse effects of conflict.</p> <p><i>Note: If the conflict was one that you directly experienced explain how you dealt with it or how, with hindsight, you could have dealt with it to produce a better outcome. If you did not directly experience the conflict explain how those involved may have dealt with it</i></p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The causes of conflict at work are identified • The stages in the development of conflict are described • The effects of conflict on individual and team performance at work are explained • Any recognised technique the manager could use to minimise and resolve conflict in the workplace is explained • The way that a manager could create harmony at work and engender a positive atmosphere in order to minimise the adverse effects of conflict is described 	

M3.15	Managing stress in the workplace
<p><u>Reflective Review</u></p> <p>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</p> <p><i>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</i></p> <p>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</p> <p>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</p> <p><i>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.</i></p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • 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 	

M3.16	Managing the employment relationship
<p><u>Work-based Assignment</u></p> <p>Identify the main provisions of statutory requirements and your organisation's employment policies and procedures that guide you in good employment practices. (The statutory requirements and organisational policies should include the employment relationship, discrimination at work and fair employment)</p> <p>Explain why diversity is important in your workplace and the consequences of not complying with diversity policies</p> <p>Identify your organisation's employment policies and procedures that deal with disciplinary issues and describe how you monitor discipline in your team</p> <p>Review your own ability to maintain discipline in the workplace by identifying your strengths and weaknesses in this aspect of your role</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The main provisions of statutory requirements for the employment relationship, discrimination at work and fair employment are identified • The organisation's employment policies and procedure that could guide the first line manager in managing diversity in the workplace are identified • The importance of diversity in the workplace is explained • The consequences of non compliance with diversity policies for own work area and for the organisation is explained • The organisation's employment policies and procedures that could guide the first line manager in dealing with disciplinary issues are identified • The ways that you could monitor discipline in the workplace is described • The legal aspects of the disciplinary process is briefly described • Own ability to maintain discipline in the workplace is reviewed 	

M3.17

Recruiting, selecting and inducing new staff in the workplace**Work-based Assignment**

Note: For this task you will, ideally, be preparing to recruit someone for a post in your area of responsibility. If this opportunity does not occur, you should ask for the opportunity to be involved in the recruitment of someone for a post elsewhere in the organisation. If this is not possible, you should use the scenario of replacing any existing member of your team. Please identify which of these three options you have selected

Identify a post for which a new employee needs to be recruited. In order to recruit to this post you should:

- Identify your organisation's policies and procedures that could guide you in recruitment, selection and induction in the workplace
- Conduct a job analysis and prepare a job description and person specification for the post
- Explain how you would prepare for selection interviews to ensure impartiality and good decision making to ensure that the best person is selected
- Explain a recognised selection technique that could be used
-

Having appointed someone to a post in your organisation, you should prepare a suitable induction for the new employee. You should:

- Explain the importance of effective induction
- Describe the phases of induction in your organisation
- Describe any legal and/or practical health and safety aspects that should be included in an induction for your workplace
- Explain one method that you could use to record the progress of an individual during induction in your workplace
- Explain how you could evaluate an induction process in your workplace

Note: If your organisation does not have an established induction system, you should describe the phases of induction that you believe should be there

Assessment Criteria

- The organisation's policies and procedures that could guide the first line manager in recruitment, selection and induction are identified
- A job analysis is conducted and a job description and person specification for a post within own area of responsibility
- The way that you would prepare for selection interviews to ensure impartiality and optimum decision making in selecting the most suitable applicant is explained
- A recognised selection technique that could be used during interviews is explained
- The importance of effective induction is explained
- The phases of induction in the organisation is described
- The legal and practical aspects of health and safety that should be included in the organisation's induction process is described
- One method that could be used to record an individual's progress during induction is explained
- How an induction process could be evaluated is explained

M3.18	Coaching and training your work team
<p><u>Work-based Assignment</u></p> <p>This activity requires that you identify an opportunity to train and coach members of your team or other individuals in your workplace. You should:</p> <ul style="list-style-type: none"> • 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 <p>Assessment Criteria</p> <ul style="list-style-type: none"> • 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 	

M3.19	Providing quality to customers
<p><u>Reflective Review</u></p> <p>Briefly describe the quality system used by your organisation. Using this quality system to illustrate your answers, where appropriate, you should:</p> <ul style="list-style-type: none"> • Explain why quality is so important to both internal and external customers in your workplace • Explain what is meant by Total Quality Management • Explain the difference between design quality standards and process quality standards • Briefly describe the quality system used by the organisation • Identify <u>two</u> quality standards set for your organisation and <u>one</u> example of the cost of quality <p>Briefly describe the tools that you use to monitor quality in your workplace and the way that quality maintenance is recorded</p> <p>Identify two practical steps you could take to improve quality in your workplace</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The reason that quality is important to internal and external customers in the organisation is explained • Total Quality Management is explained • The difference between design quality standards and process quality standards is explained • One example of the cost of quality in the workplace is identified • The quality system used by the organisation is briefly described • Two quality standards set for the organisation are identified • The tools used to monitor quality in the workplace are briefly described • The records for maintaining quality in the workplace are briefly described • Two practical and positive steps to improve quality to meet customer requirement in the workplace is identified 	

M3.20	Planning to work efficiently
<p><u>Reflective Review</u></p> <p>This activity is concerned with the way that you plan work for your team. You should:</p> <ul style="list-style-type: none"> • Identify the targets set for your team, including the indicators that will be used to measure these targets • Identify which, if any, of these targets is related to efficiency and/or effectiveness • Use <u>one</u> planning technique to plan a job activity in your workplace and explain how you would monitor the planned job activity • Explain why the supply chain is so important in delivering results and meeting your customers' requirements <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The targets set for the team are identified and the performance measurement indicators stated • One appropriate planning technique to plan a job activity is used • One technique to monitor and control a planned job activity is explained • The importance of the supply chain in delivering results and meeting customer requirements is explained • The importance of effectiveness and efficiency to achieve workplace objectives is explained • How efficiency and effectiveness are measured in your organisation is explained 	

M3.21	Organising and delegating
<p><u>Reflective Review</u></p> <p>Review how you plan and delegate tasks to your team and:</p> <ul style="list-style-type: none"> • Explain why it is so important to make effective and efficient use of your team's knowledge and skills while planning to achieve work objectives • Explain <u>one</u> technique you use to schedule and allocate work to your team and individuals • Explain how human resource planning can be used to assure output and quality <p>Identify <u>one</u> occasion when you have delegated responsibility to, and <u>one</u> occasion when you have attempted to empower, a member of your team (or opportunities for delegation and empowerment that may occur at some point in the future):</p> <ul style="list-style-type: none"> • Briefly discuss each of these examples of delegation and empowerment in your workplace • Identify and describe <u>one</u> barrier to delegation in your workplace and <u>one</u> mechanism to support delegation in your workplace • Explain <u>one</u> technique that you use (or could use) to monitor the outcomes of delegation in your workplace • Review the effectiveness of feedback, recognition and reward techniques in your workplace <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The importance of making effective and efficient use of people's knowledge and skills while planning the team's work to achieve objectives is explained • One technique is used to identify the appropriate person for an activity • How human resource planning can be used to assure output and quality is explained • One example of delegation and one example of empowerment in the workplace is given • One barrier to delegation and one mechanism to support delegation is identified • One technique that could be used to monitor the outcomes of delegation in the workplace is explained • The effectiveness of feedback, recognition and reward techniques in the workplace is reviewed 	

M3.22	Managing projects
<p><u>Work-based Assignment</u></p> <p>Identify and describe a simple project you could undertake that should lead to savings in the workplace and, having done this, you should:</p> <ul style="list-style-type: none"> • Plan the project using <u>one</u> appropriate project planning technique • Identify <u>one</u> simple tool that could be used to determine the financial viability of the project • Set targets to monitor your performance • Explain <u>one</u> technique you would use to evaluate your project • List those areas where savings in the workplace would be achieved as a result of your project • Identify the wider non financial implications that could arise as a result of your project <p>Assessment Criteria</p> <ul style="list-style-type: none"> • A simple workplace project is identified • One simple tool for determining the financial viability of the project is used • The project is planned using one appropriate project planning technique • Objectives and targets/milestones to monitor performance and review plans are set • One project evaluation technique is used • Areas where net savings could be achieved as a result of the workplace project is listed • Wider non financial implications that could result from the workplace project are identified 	

M3.23	Managing health and safety
<p><u>Reflective Review</u></p> <p>Carry out a review of your role and responsibilities in relation to health, safety, welfare and environment protection at work. You should:</p> <ul style="list-style-type: none"> • Identify two pieces of legislation relating to health, safety, welfare and environmental protection relevant to your workplace • Explain two duties the law imposes on you, as a manager, and on your team • Outline your responsibility as a manager contained in your organisation's Health and Safety Policy or Environmental Protection Policy • Explain what is meant by "a competent person" in your workplace in the context of health and safety • Identify <u>two</u> ways you can provide health and safety or environmental protection information, instruction and training to your team • Identify the expertise available in your organisation to help and advise you regarding issues of health and safety and environmental protection <p>Conduct a simple risk assessment in your workplace and explain <u>one</u> practical accident prevention and control measure that could be implemented</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Two pieces of legislation relating to health, safety and welfare at work are identified • Two duties statute law imposes on both the manager and the team is explained • The manager's responsibilities contained within the organisation's Health and Safety Policy are outlined • The meaning of "a competent person" is explained • Two ways to provide Health and Safety information, instruction and training to the team are identified • Expertise available in the organisation to help and advise the manager on health and safety issues is identified • A simple risk assessment is conducted in the workplace • One practical accident prevention and control measure that could be implemented in the workplace is explained • The importance of environmental responsibility for your organisation is explained • The action the first line manager could take to enable the organisation to fulfil its environmental responsibility is described 	

M3.24

Understanding organisations in context

Reflective Review

Provide a short profile of your organisation and its stakeholders, explain your own role within it, and compare it to managers at other levels within the organisation.

Note: To complete the profile effectively you should identify the organisation's legal entity, its principal stakeholders and their relevance to the organisation and list the organisation's operational functions, and use an organisation chart to identify and explain your own role, span of control and reporting lines in relation to other managers

Identify the main financial documents used by your organisation and briefly describe their importance and the information they contain

Give examples of long-, medium- and short-term funds used by (or which could be used by) the organisation and identify a performance indicator that is relevant to each of these

Identify the major economic and political forces that currently have an impact upon the organisation (either positive or negative). Describe any actions that a government could take which would have an effect on these.

Note: In identifying the economic and political impacting on the organisation you should make some reference to the effects of international organisations, globalisation and exchange rates (explaining why they do NOT affect your organisation, if that is the case)

Assessment Criteria

- The legal entity of the organisation is identified
- The operational functions within the organisation is listed
- An organisational chart is used to identify own role, span of control and reporting line in the organisation
- The roles and responsibilities of managers at different levels of the organisation is briefly outline
- The relevance to an organisation of its different stakeholders if briefly explained
- Important financial information for management is explained
- The main financial documents needed by the organisation are identified and the information they contain are briefly described
- The most significant financial indicators of business performance in the organisation are identified and their relevance is briefly described
- The main sources of long, medium and short term funds for the organisation are listed
- The major economic and political forces which impact upon the organisation are identified
- How government attempts to influence the economy and its effect on the organisation's operations is briefly described

M3.25

Understanding culture and ethics in organisations

Reflective Review

Carry out a 'values and culture' assessment of the organisation, identifying and describing the culture of the organisation and their commitment to social responsibility and sustainability

Note: Your answer should explain what is meant by culture and values and describe the dominant culture and values within the organisation. You should also explain how they influence the management style and team structure, and extent to which they encourage or discourage 'internal politics'. Finally, you should consider how well the organisation demonstrates a sense of social responsibility, giving an example of any one way that it does this, or could do it

Review your own role in promoting the organisation's values, culture, social responsibility and sustainability, and how you would respond to any problems that may occur. In your answer you should:

- Describe how you communicate the organisation's values to your team
- Explain what you would do if two of your team members had differing perceptions, values or cultures that adversely effected the workplace (or what you have done, if this has occurred)
- Explain how to approach problems in the workplace without creating a "blame culture"
- Explain what you would do if a team member's personal values clashed with that of the organisation's (or what you have done, if this has occurred)
- Explain how you would advise a team member who felt that the organisation had not responded to reports of malpractice at work, including the person's rights under Public Interest Disclosure legislation

Assessment Criteria

- The dominant culture with the organisation is describe and how this influences the management style and team structure is explained
- Own responsibility to promote the organisation's vision and help shape the culture is recognised
- How to approach problems in the workplace without creating a "blame culture" is explained
- How internal politics could arise within the organisation and its possible effects is briefly explained
- Values within the context of the organisation are defined
- How to communicate the organisation's values to the team is described
- How a first line manager could approach a problem between individuals who have different perceptions, values or cultures is explained
- How a first line manager could approach a problem where an individual's personal values clash with that of the organisation is explained
- One of the organisation's corporate social responsibilities is described
- The rights given to people at work by the Public Interest Disclosure legislation to "blow the whistle" on perceived malpractice is briefly explained
- The importance of social responsibility and sustainability is explained
- What action the first line manager could take to enable the organisation to fulfil its social responsibility is described

M3.26	Managing performance
<p><u>Reflective Review</u></p> <p>Explain your role in performance management in your workplace. In your answer you should:</p> <ul style="list-style-type: none"> • Briefly explain your role in performance management • Give an example of a SMART objective and a performance standard you have agreed for your team • Explain how you would measure performance against this standard • Select an example of underperformance that has occurred in your workplace (or could potentially occur) and explain a performance improvement technique that you used (or could use) to address this variance <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The role of the first line manager in performance management is briefly explained • SMART objectives are set for the team • Performance standards are set for the team • How you would measure performance against agreed standards is explained • An example of underperformance in the workplace is selected and a performance improvement technique available to address this underperformance explained 	

M3.27	Working with costs and budgets
<p><u>Reflective Review</u></p> <p>Explain how budgetary and cost control helps you (or could help you if you do not yet have budgetary responsibility) to manage your team more effectively. In your answer you should:</p> <ul style="list-style-type: none"> • Explain the importance of agreeing to a budget and operating within it • Describe how you (could) monitor variance between actual performance and budget • Explain how you (could) gather information to be used in determining and/or revising budgets • Explain the concepts of fixed and variable costs and break even • Explain how basic cost statements and standard costs are used (or could be used) in your workplace, explaining their purpose and nature and how they are (or could be) used to control costs <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The importance of agreeing to a budget and operating within it are explained • A method to monitor variance between actual performance and budget is described • How information is gathered and used in determining and/or revising budgets is explained • Fixed and variable costs and the concept of break even in relation to the organization is explained • The purpose and nature of basic cost statements is explained • The value of standard costing and its role as a control mechanism is explained • The mechanisms in the organisation to maintain control of costs are briefly explained 	

M3.28	Managing the efficient use of materials
<p><u>Reflective Review</u></p> <p>Describe how stock requirements are determined in your workplace and how stocks of supplies are recorded, received and issued. Identify organisational stores/stock control principles and procedures and their role in ensuring that quality standards are met. Explain <u>two</u> consequences of not maintaining optimum stocks.</p> <p>Outline how waste is measured and monitored in the organisation. Identify <u>two</u> areas where it may be possible to reduce waste in the workplace and put together a simple action plan to do this.</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • How to determine stock requirements in the workplace is described • Two consequences of not maintaining optimum stocks in the workplace is explained • Organisational stores/stock control principles and procedures are identified • The organisation's procedures for recording, receipt and issue of supplies is outlined • Why quality standards need to be maintained in the organisation is briefly described • Potential waste in the organisation is identified • The techniques and/or methods for measuring and monitoring waste in the organisation is outlined • A simple action plan to minimise waste in the workplace is compiled 	

M3.29	Managing the effective use of equipment
<p><u>Reflective Review</u></p> <p>Review the way that equipment is used, monitored, maintained and secured. In your answer you should:</p> <ul style="list-style-type: none"> • Conduct a simple risk assessment of equipment security in the workplace and explain how these risks could be reduced • Explain <u>why</u> equipment should be used effectively and efficiently and <u>why</u> it is important to have a scheduled maintenance programme for equipment in the workplace • Describe how the use of equipment is monitored and controlled in the workplace and compile a simple maintenance programme for equipment in the workplace <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Why equipment should be used effectively and efficiently is explained • How the use of equipment is monitored and controlled in the workplace is described • Why it is important to have a scheduled maintenance programme for equipment in the workplace is explained • A simple maintenance programme for equipment in the workplace is compiled • A simple risk assessment of equipment security in the workplace is conducted and how these risks could be used is explained 	

M3.30	Understanding the communication process in the workplace
<p><u>Reflective Review</u></p> <p>Identify two specific communication needs that you have at work and plan how you can best meet these needs, using one oral (ie spoken) and one written means of communication. In your answer you should:</p> <ul style="list-style-type: none"> • Explain your two chosen communication activities with reference to the stages in the communication process and give at least one advantage and one disadvantage of your two chosen ways of communicating your message <p>You should identify potential barriers to communication that might occur and show how you will overcome them. In your answer you should:</p> <ul style="list-style-type: none"> • Identify <u>two</u> possible barriers to communication in your workplace, in relation to either of the two communication activities, and describe how each barrier could be overcome • In your chosen oral communication, you should describe how you would take account of the influence of non-verbal communication on the receiver <p>Identify ways that you can increase your awareness of information in the workplace and improve your attention and concentration span</p> <p>Explain how you will use feedback to check the effectiveness of your communication.</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The stages in the communication process are outlined • Two possible barriers to communication in the workplace are identified and how each barrier could be overcome described • Two different types of communication that could ensure effective communication in the workplace is named and an advantage and a disadvantage identified of each • How non-verbal communications can influence the receiver is explained • How to use feedback to check the effectiveness of communication is briefly explained • How you could increase information awareness in your workplace is explained 	

M3.31	Influencing others at work
<p><u>Reflective Review</u></p> <p>Identify a network that you are part of (or that you could be part of) and explain what its value is (or would be) to you and what you (could) do to establish and maintain your relationship with the network.</p> <p>Identify a situation in the workplace where you have wanted to persuade someone to accept your point of view on a topic. Review how effective you were, with reference to the general principles of negotiation. Describe what you did to reduce resistance and minimise conflict in order to achieve a win-win situation.</p> <p>Review your effectiveness in influencing people in your team to achieve workplace objectives</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The value to the first line manager of networking is explained • An appropriate network for a first line manager is identified and methods described to establish and maintain effective professional relationships with the identified network • The general principles of negotiation are explained • A relevant technique for influencing others to achieve workplace objectives is explained • How to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations is described 	

M3.32	Communicating one-to-one at work
<p><u>Reflective Review</u></p> <p>Identify a situation where you have specifically chosen to use one-to-one communication.</p> <ul style="list-style-type: none"> • Identify any other methods of direct communication that were open to you to use and explain why it was important for you to use one-to-one communication. • Identify some of the non-verbal behaviours that either of you used which were significant in the communication process <p>Identify a situation in the workplace where an interview is required. You should then</p> <ul style="list-style-type: none"> • Prepare for and plan the interview • Explain how you would conduct interviews effectively, ethically and within the law • Describe what record keeping is required for the type of interview you will conduct • Explain how you would provide feedback to the interviewee after the interview where appropriate <p>Assessment Criteria</p> <ul style="list-style-type: none"> • A range of non-verbal behaviours which can affect people in the workplace is identified • The importance of one-to-one communication is explained • Two methods of direct communication used in the workplace is listed • The importance of succinct and accurate records of one-to-one oral communication is explained • How you could prepare for and plan an interview for a specific situation in your organisation is explained • How you could conduct interviews effectively, lawfully and ethically is explained • How you would evaluate that the interview had been conducted effectively, lawfully and ethically is explained • What record keeping is required for the type of interview is decided • How you would provide feedback to the interviewee where appropriate is explained 	

M3.33	Effective meetings for managers
<p><u>Work-based Assignment</u></p> <p>Describe how you would prepare prior to a meeting Explain the following:</p> <ul style="list-style-type: none"> • 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 <p>Assessment Criteria</p> <ul style="list-style-type: none"> • 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
<p><u>Reflective Review</u></p> <p>Purposes of record keeping Explain the purposes of record-keeping for your organisation</p> <p>Key information</p> <ul style="list-style-type: none"> • 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) <p>Storage and retrieval of information Identify appropriate systems to store and retrieve information in your organisation</p> <p>Data Access Control Explain the need to control access to data</p> <p>Electronic communication</p> <ul style="list-style-type: none"> • 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 <p>Assessment Criteria</p> <ul style="list-style-type: none"> • 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
<p><u>Work-based Assignment</u></p> <p>Marketing concepts – You should:</p> <ul style="list-style-type: none"> • 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 <p>Assessment Criteria</p> <ul style="list-style-type: none"> • 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 	

M3.36	Leading a team effectively
<p>Reflective Review</p> <p>Review how you lead, motivate, support and develop your team to achieve its goals. This task can be either written or presented orally.</p> <p>You should describe:</p> <ul style="list-style-type: none"> • its vision and strategy (or the vision and strategy of the project on which you are working), • the importance of having such a vision and strategy, and • how this has been translated into objectives for your team • Explain how you communicated to team members the team's objectives and how these contributed to fulfilling the goals of the organisation or the project • Assess how effective you were in communicating this common sense of purpose to the team, using feedback from team members and other evidence to help identify your strengths and areas for improvement. • Identify and very briefly describe a specific situation in which you have needed to show leadership to your team, to complete a task successfully or achieve a particular goal. • Outline how you behaved, in leading the team, and use this behaviour to identify the particular leadership style or styles you used. • Explain why you used the particular leadership style(s), considering your own preferences, the particular situation and also the organisation's working practices and culture. • Review the leadership style(s) adopted to identify the effectiveness of the style(s) in ensuring that the task was completed or the goals achieved successfully. • Review your own effectiveness in using the chosen leadership style(s) and behaviours to identify what you did well and how you should improve your performance. <p>Using specific examples of actions you have taken, explain what you have done to:</p> <ul style="list-style-type: none"> • motivate the whole team to achieve agreed goals (using a specific theory or model of motivation to help you to explain your actions); • motivate an individual member of the team to achieve agreed goals, (using a specific theory or model of motivation to help you to explain your actions); • support an individual team member, explaining why this was necessary and how effective it was; • develop the whole team, to work effectively together as a team; and • develop an individual team member to enable him or her to perform more effectively. <p>Assessment Criteria</p> <ul style="list-style-type: none"> • The importance of the team having a common sense of purpose that supports the overall vision and strategy of the organisation or project is explained • The key role that communication plays in establishing a common sense of purpose is explained and the effectiveness of own communication skills assessed • The factors that will influence their choice of leadership styles or behaviours in workplace situations are identified • Why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour are explained • 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 are assessed • Appropriate actions to enhance own leadership behaviour in the context of the particular leadership model are described • The importance of the leader being able to motivate teams and individuals and gain their commitment to objectives is explained • The main motivational factors in a work context and how these may apply to different situations, teams and individuals are described • The role that the leader plays in supporting and developing the team and its members is explained and practical examples of when this will be necessary are given 	

M3.37	Developing own leadership capability using action learning
<p><u>Reflective Review</u></p> <p>Summarise your strengths and limitations as a leader, set yourself some goals to improve your performance, and identify what you can do to achieve these goals.</p> <p>Explain how you can benefit from being part of an action learning set to help you achieve your goals, outline what an action learning set is, how it operates and why it is particularly useful in developing leadership performance</p> <p>Over the period in which you are a member of the action learning set you should maintain a record of:</p> <ul style="list-style-type: none"> those 'problems' that you brought to the set, the actions that you agreed to take with the rest of the set', how you put those agreed actions into effect; and how effective they were in helping you to improve your leadership performance. <p>At the end of the period during which the action learning set has been planned to operate, review the goals you set for yourself to improve your performance and assess how well they have been achieved and in what ways your performance has improved</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Own leadership strengths and limitations are identified • Appropriate actions to develop own leadership capacity are identified and planned within realistic time scales, using available sources of help and support • The nature and benefits of action learning, the responsibilities of an individual within an action learning set or group and the role of action learning in own leadership development are explained • The way that action learning was used to develop own leadership performance is explained • Improvements in own leadership performance are identified, analysed and reflected on 	

M3.38

Introduction to managing and maintaining property and assets**Work-based Assignment**

This assignment is about managing and maintaining property and assets in your organisation (or in another organisation with which you are familiar if you are unemployed)

The estate management function

- Describe the property portfolio of your organisation
- Explain the benefits and disadvantage of being a tenant and a owner occupier
- Describe the basics of the property law
- Describe the purpose of having a property register

Assessment Criteria

- Described the property portfolio of their employing organisation
- Explained the benefits and disadvantages of being a tenant and an owner-occupier
- Described the basics of the property law
- Described the purpose of having a property register

Premises and building services maintenance

- List the building services and fabric components within your organisation's estate
- Explain the purpose of a building asset register
- Identify the ongoing maintenance activities that are carried out and give the resources needed for one of these activities
- Describe the types of maintenance regimes
- Explain what factors you would consider when developing maintenance plans and schedules
- Explain how a computerised maintenance management system could enhance performance recording and tracking of maintenance activities

Assessment Criteria

- Listed the building services and fabric components within their organisation's estate
- Explained the purpose of a building asset register
- Identified the ongoing maintenance activities that are carried out and gave the resources they or others may need for one of these typical maintenance tasks
- Described the types of maintenance regimes
- Explained what factors they should consider when developing maintenance plans and schedules
- Explained how a computerised maintenance management systems can enhance performance of recording and tracking maintenance activities

M3.39	Introduction to the effective management of space within own organisation
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Briefly explain the key concepts and principles of space planning and management • State the relevant legislation that impacts on space management activities in own organisation • Describe the management and implementation of a space management project • Identify a relevant space layout drawing in your organisation and interpret it • List attributes that have to be updated on completion of a space management project • List examples of ways that space is used in your organisation and briefly explain how it could be better utilised <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Briefly explained the key concepts and principles of space planning and management • Stated the relevant legislation that impacts on space management activities in own organisation • Described the management and implementation of a space management project • Effectively interpreted a space layout drawing • Listed attributes that have to be updated on completion of a space management project • Listed examples of ways that space is used in own organisation and briefly explained how it could be better utilized • Described how to encourage responsible space occupancy 	

M3.40	Understanding support services operations
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Describe the range of support services that are required by your organisation and identify the legislation that impacts on these services • Describe the role of service level agreements, their structure and format and how they are used with both customers and suppliers in your organisation • Briefly describe what support services are currently being provided by the facilities management department and how these are delivered • Explain various ways of providing support services to meet organisational requirements • Explain how the quality of support services is measured and monitored <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Described the range of support services that are required by own organisation and identified the legislation that impacts on these services • Described the role of service level agreements, their structure and format and how they are used with both customers and suppliers in own organisation • Briefly described what support services are currently being provided by the facilities management department and how these are delivered • Explained various ways of providing support services to meet organisational requirements • Explained how the quality of support services is measured and monitored 	

M3.41	Managing sustainability and environmental issues
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Explain the terms sustainability and corporate social responsibility and the legislation associated with these concepts • List the environmental standards required in your organisation • Explain the environmental issues affecting your organisation • Describe ways to manage issues affecting your organisation in an environmentally friendly way • Explain the constraints of your organisation's building(s) on environmentally friendly procedures and practices • Explain the opportunities to enhance your organisation's building(s) environmentally friendly performance <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Explained the terms sustainability and corporate social responsibility and the legislation associated with these concepts • Listed the environmental standards required in own organisation • Explained the environmental issues affecting own organisation • Described ways to manage issues affecting own organisation in an environmentally friendly way • Explained the constraints of own organisation's building(s) on environmentally friendly procedures and practices • Explained the opportunities to enhance own organisation's building(s) environmentally friendly performance 	

M3.42	Managing utility services and energy efficiency in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Explain what utility services are required by your organisation and examine what is actually provided • Explain the options of acquiring utility services to bridge the gap between your organisation's requirements and actual provision • Explain the importance of energy management for your organisation • Examine how your organisation measures energy requirements and actual consumption to determine efficiency • Identify ways of improving your organisation's energy efficiency <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Explained what utility services are required by own organisation and examined what is actually provided • Explained the options of acquiring utility services to bridge the gap between own organisation's requirements and actual provision • Explained the importance of energy management for own organisation • Examined how own organisation measures energy requirements and actual consumption to determine efficiency • Identified ways of improving own organisation's energy efficiency 	

M3.43	Understanding procurement and supplier management in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Examine and explain relevant procurement procedures in your organisation • Describe how procurement requirements can be identified and validated • Give an example of typical purchases in your area of responsibility • Give an example of a supply chain in your organisation • Describe types of specifications used in your organisation • List specialists and suppliers used by your organisation and explain how these specialists and suppliers are selected • Briefly explain how the performance of specialists and suppliers is monitored and how continuous improvement is encouraged <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Examined and explained relevant procurement procedures in own organisation • Described how procurement requirements can be identified and validated • Gave an example of typical purchases in own area of responsibility • Gave an example of a supply chain in own organisation • Described types of specifications used in the organisation • Listed specialists and suppliers used by own organisation and explained how these specialists and suppliers are selected • Briefly explained how the performance of specialists and suppliers are monitored and how continuous improvement is encouraged 	

M3.44	Understanding facilities management within the context of your organisation
<p><u>Knowledge Review</u></p> <p>This assignment is about understanding facilities management within the context of an organisation. To do this you will have to</p> <ul style="list-style-type: none"> • Examine and explain trends within facilities management and identify a potential trend that may benefit your organisation • Examine and describe which organisations are considered to be market leaders in terms of facilities management Briefly define the role of the facilities manager • Briefly describe the purpose of your organisation, its culture and its performance goals and objectives. Explain how facilities management can assist your organisation in achieving its goals • Briefly describe your organisation's structure and how facilities management operates within this structure (you can use a diagram to illustrate this) • Briefly explain possible consequences of poor and ineffective facilities management • Briefly reflect on your own ability to influence others to accept both popular and unpopular facilities management actions <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Examined and explained trends within facilities management and identified a potential trend that may benefit own organisation • Examined and described which organisations are considered to be market leaders in terms of facilities management • Briefly defined the role of the facilities manager • Briefly described the organisation's purpose, its culture, its performance goals and objectives and explained how facilities management can assist the organisation in achieving its purpose • Briefly described the organisational structure and explained how facilities management operates within it • Briefly explained possible consequences of poor and ineffective facilities management • Briefly reflected on own ability to influence others to accept both popular and unpopular facilities management actions within the context of own organisation 	

M3.45	Managing and developing relationships in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Identify and examine the needs and expectations of customers, colleagues, key stakeholders and relevant others in your workplace • Explain the importance of knowing what customers, colleagues, key stakeholders and relevant others in your workplace require • Determine ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in your workplace within organisational constraints • Explained ways of checking that the needs and expectations of other have been met • Examined and explained ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Identified and examined the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace • Explained the importance of knowing what customers, colleagues, key stakeholders and relevant others in the workplace require • Determined ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace within organisational constraints • Explained ways of checking that the needs and expectations of others have been met • Examined and explained ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints 	

M3.46	Managing contracts and contractors in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Briefly outline contract management procedures and tools used in your workplace • Give an example of a contract that you assist in managing and explain how you do this • Explain how to communicate all relevant information to contractor(s) in the workplace • Give an example of a contractor that you manage and explain what information the contractor will require to perform their function safely • Use the example that you have provided and explain a control tool that you could use to monitor the contractors work • Use the example that you have provided and explain how you could stop a contractor working if the work were unsafe, unauthorised or causing business disruption <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Briefly outlined contract management procedures and tools used in own workplace • Gave an example of a contract that they assist in managing and explained how they do this • Explained how to communicate all relevant information to contractor(s) in the workplace • Gave an example of a contractor that they manage and explained what information the contractor will require to perform their function safely • Used the example they have provided and explained a control tool that they could use to monitor the contractors work • Used the example they have provided and explained how they could stop a contractor working if the work were unsafe, unauthorised or causing business disruption 	

M3.47	Delivering service in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Identify a facilities management service that must be delivered in your workplace • Plan the delivery of the facilities management service identified, including all resource requirements • Explain how the delivery of the facilities management service identified will be communicated to others • Explain how you would collect and evaluate feedback from relevant others about the facilities management services you identified and planned • Explain what tool you would use to continuously monitor the effective delivery of facilities management services to ensure continuous improvement <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Identified a facilities management service that must be delivered in the workplace • Planned the delivery of the facilities management service identified including all resource requirements • Explained how the delivery of the facilities management service identified would be communicated to others • Explained how they would collect and evaluate feedback from relevant others about the facilities management service identified and planned • Explained what tools they would use to continuously monitor the effective delivery of facilities management services to ensure continuous improvement 	

M3.48	Understanding incident management and disaster recovery in the workplace
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Explain the process of risk management • Describe potential hazards and incidents that could occur in your workplace • Describe potential outcomes if hazards and incidents are not managed • Explain how to reduce the impact of hazards on people and the organisation • List mitigation measures used to prevent incidents in your organisation • Describe monitoring and review processes that are used in your organisation • Explain the recovery procedures in your organisation • Describe an incident that could occur in your workplace and explain your role should this incident occur <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Explained the process of risk assessment • Described potential hazards and incidents that could occur in own workplace • Described potential outcomes if hazards and incidents are not managed • Explained how to reduce the impact of hazards on people and the organisation • Listed mitigation measures used to prevent incidents in the organisation • Described monitoring and reviewed processes that are used in own organisation • Explained the recovery procedures in own organisation • Described an incident that could occur in own workplace and explained their role should this incident occur 	

M3.49	Understanding security measures in the workplace
<p><u>Knowledge Review</u></p> <p>Identify and explain security measure in your organisation and workplace Briefly describe relevant legislation affecting securing measures in your workplace Examine the effectiveness of prescribed security measures in your organisation and workplace Identify potential weaknesses between prescribed security measures and what happens in reality Based on the most important potential weaknesses identified, propose appropriate improvements to security measures</p> <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Identified and explained security measures in own organisation and workplace • Briefly described relevant legislation affecting security measures in the workplace • Examined the effectiveness of prescribed security measures in the organisation and workplace • Identified potential weaknesses between prescribed security measures and what happens in reality • Based on the most important potential weaknesses identified proposed appropriate improvements to security measures 	

M3.51	UNDERSTANDING ADVANCED SITE WASTE MANAGEMENT
<p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Recall 5 steps in the development of SWMP legislation • Explain ten of the duties and responsibilities of the Client, Principal Contractor and Subcontractors to ensure compliance with the SWMP regulations • List five of the potential offences for non-compliance with the SWMP regulations • List five of the main benefits of SWMPs • List five of the requirements for projects valued between £300,000 and £500,000 • List five of the requirements for projects valued above £500,000 • List two of the requirements for the final report • List four sources of additional information for environmental and waste best practice on site <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Recalled the steps in the development of SWMP legislation • Explained the duties and responsibilities of the Client, Principal Contractor and Subcontractors to ensure compliance with the SWMP regulations • Listed the potential offences for non-compliance with the SWMP regulations • Listed the main benefits of SWMPs • Listed the requirements for projects valued between £300,000 and £500,000 • Listed the requirements for projects valued above £500,000 • Listed the requirements for the final report (within three months of completion) • Listed sources of additional information for environmental and waste best practice on site 	

M3.52	WRITING A SITE WASTE MANAGEMENT PLAN
<p>Write a clear and coherent full Site Waste Management Plan that meets the requirements of current legislation within the context of the construction site that you are employed and demonstrate compliance with the Duty of Care Regulations.</p> <p><u>Knowledge Review</u></p> <ul style="list-style-type: none"> • Identify the required project information (before work commences on the site) • Identify all subcontractors • List all waste streams arising on site • Estimate waste volumes for each waste stream • Establish targets to reduce, re-use, recycle waste arising on site • Identify all waste contractors and record all checks necessary to ensure legal compliance • Submit 5 examples of Waste Transfer Notes that contain the required information • Explain what arrangements you would make for correct storage of records <p>Assessment Criteria</p> <ul style="list-style-type: none"> • Identified the required project information (before work commences on the site) • Identified all subcontractors • Listed all waste streams arising on site • Estimated waste volumes for each waste stream • Established targets to reduce, re-use, recycle waste arising on site • Identified all waste contractors and recorded all checks necessary to ensure legal compliance • Ensured Waste Transfer Notes contain the required information • Explained arrangements for correct storage of records 	

M3.53**IMPLEMENTING A SITE WASTE MANAGEMENT PLAN**

This task is assessed by observation or a written assignment to demonstrate how you implemented your site waste management plan with evidence.

Knowledge Review

- Demonstrate adequate arrangements are in place for material storage to minimise risk of damage
- Demonstrate adequate arrangements are in place for waste disposal from site (e.g. segregate)
- Establish signage as required
- SWMP is available to all who work on site
- Communicate the requirements of the SWMP
- SWMP is included in the site induction
- Provide additional training as needed to ensure all work on site is carried out within the terms of the SWMP
- Record waste disposed of from site, including waste description (inc. EWC), volume, destination, waste management option, and demonstrate this waste has been reduced, re-cycled and recovered where practicable
- Compare progress against targets
- Revise the plan on a regular basis
- Complete an environmental audit on site
- Evaluate compliance with legislation
- Develop an action plan to include recommendations for improvement
- Provide sufficient security measures on site to prevent illegal disposal of waste from site

Assessment Criteria

- Demonstrated adequate arrangements are in place for material storage to minimise risk of damage
- Demonstrated adequate arrangements are in place for waste disposal from site (e.g. segregate)
- Established signage as required
- Ensured the SWMP is available to all who work on site
- Communicated the requirements of the SWMP
- Ensured the SWMP is included in the site induction
- Provided additional training as needed to ensure all work on site is carried out within the terms of the SWMP
- Recorded waste disposed of from site, including waste description (inc. EWC), volume, destination, waste management option, and demonstrated this waste has been reduced, re-cycled and recovered where practicable
- Compared progress against targets
- Revised the plan on a regular basis
- Completed an environmental audit on site
- Evaluated compliance with legislation
- Developed an action plan to include recommendations for improvement
- Provided sufficient security measures on site to prevent illegal disposal of waste from site