ILM LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

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Institute of Leadership & Management

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Institute of Leadership & Management (ILM)

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**Institute of
Leadership &
Management**

ILM LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

[Qualification No. – 600/2276/0]

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

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QUALIFICATION OVERVIEW:

ILM Level 5 Certificate in Project Management Skills	
Purpose of the qualification	The purpose of this qualification is to equip practising or potential middle managers with the knowledge and skills required to be able to manage a project successfully
Progression routes	Successful candidates may benefit from career enhancement and/or progress to any of the further qualifications listed, dependent of their circumstances: • ILM Level 5 Certificate in Business Support • ILM Level 5 Diploma in Management • ILM Level 6 Award in Management
Credit Value	Total of 19 (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 74
To be completed within	3 Years

Structure	**Mandatory Units**	**Credit Value**
	M5.15 Managing Projects in the Organisation	4
	Optional Units *(Learner must achieve a minimum of 15 credits from this group)*	**Credit Value**
	M5.17 Managing Resources	4
	M4.28 Understanding Financial Management	2
	M5.03 Making a Financial Case	3
	M5.10 Understanding the Organisational Environment	5
	M5.05 Leading Innovation and Change	5
	M4.08 Solving problems by making effective decisions in the workplace	3
	M5.18 Managing information	4
	M5.46 Developing and leading teams to achieve organisational goals and objectives	4

OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

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 assurors 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).	• 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.	• 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 assessment and internal quality assurance.	• Ideally hold a valid and recognised teaching/training qualification.

Internal Quality Assurors and/or Centre Assessors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	• 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.	• 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.	• 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.	• 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 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

A brief introduction on ILM's Assessment Strategy can be found in S*upporting 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 5 Certificate in Project Management Skills.

Appendix B in this document outlines the assessments and mark sheets for the mandatory units in this qualification and Appendix C for the 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 assessment(s):

Mandatory Unit	Assessment
M5.15 Managing Projects in the Organisation	Work-Based Assignment

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 only 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 LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

Title:	Managing projects in the organisation (M5.15)
Level:	5
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Be able to manage a project in an organisation	1.1 Assess the usefulness of project management tools and techniques for managing a project within own organisation 1.2 Plan the implementation of a project within own organisation 1.3 Communicate the project plans with appropriate colleagues and stakeholders, gaining agreement where necessary 1.4 Implement the project plan, monitoring progress against agreed targets
2 Be able to evaluate own ability to manage a project	2.1 Use feedback from others to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses 2.2 Create a self-development plan to improve own performance in managing projects
Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability to be able to manage projects as required by a practising or potential middle manager.
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, F2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if	Council for Administration (CfA)

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
Units available from	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit	
Indicative Content:	
1	• Project sponsors, stakeholders and scope • Work breakdown and product breakdown structure • Gantt and bar charts, critical path analysis • Methods of reducing project times and costs • Resource analysis, and re-scheduling • Methods to monitor and evaluate project progress and final outcomes, including finance • Project communication methods • Links to change management • Information technology solutions • Benefits of project management • Key project management terminology • Characteristics of project managers • Organisational structures to support projects • Types of project; the project life cycle, PRINCE2 • Feasibility studies; risk management techniques • Project team roles; critical relationships • Procedures for project closure
2	• Using feedback from others to critically evaluate own performance • Techniques for collecting and analysing feedback from others, including 360^0 feedback • Personal development planning

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

Learning outcomes (the learner <u>will</u>)	Assessment criteria (the learner <u>can</u>)
1 Understand how to manage physical resources for which you are accountable	1.1 Evaluate the effective and efficient use of physical resources for which you are accountable, in line with organisational policies and procedures 1.2 Assess the procedures for the maintenance and safe use of physical resources for which you are accountable, in line with organisational policies and procedures 1.3 Assess the procedures for the security of resources for which your you accountable in line with organisational policies and procedures 1.4 Identify opportunities for improvement in own organisation's policies and procedures for the management of physical resources
2 Be able to plan and implement improvements for managing physical resources for which you are accountable.	2.1 Plan improvements to the management of physical resources for which you are accountable, informed by your evaluation and assessment 2.2 Implement improvements to the management of physical resources for which you are accountable, ensuring compliance with organisational policies and procedures

Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability to be able to manage physical resources in own area of operation, as required by a practising or potential middle 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: F3
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	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	01/10/2007
Unit guided learning hours	12

Additional Guidance about the Unit

Indicative content:

1	• Planning usage of resources, obtaining resources, ensuring availability of resources, monitoring resources • Implications of equipment usage such as acquisition and operating costs, lean management • Methods of capacity planning • Routine scheduled maintenance programmes • Measures to ensure the safety and security of equipment • Measures for the safe operation of equipment, including training • Methods of determining materials requirements, including MRP and JIT • Organisation policies and procedures relating to physical resources • Purchasing and procurement procedures • Materials control principles and procedures, including EBQ and EOQ • Procedures for recording receipt and issue of materials • Materials storage, including safety and security • Incidence of waste and measures to minimise waste • Energy management
2	• Business process improvement to reduce variation or waste in business processes • Aligning business processes and resource usage to organisational goals and organisational policies and procedures • Principles of project management

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

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

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of finance within the context of an organisation as required by a practising or potential middle manager.
Unit 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: E2

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	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	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit

Indicative Content:

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

Title:	Making a financial case (M5.03)
Level:	5
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand financial concepts used to inform management decisions	1.1 Explain the differences between capital and revenue expenditure, using examples 1.2 Explain how costs are classified, using examples 1.3 Explain how costs are allocated, using examples
2. Be able to make a financial case to inform a management decision	2.1 Use a range of financial evaluation techniques to inform a management decision

Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability to be able to make a financial case as required by a practising or potential middle manager.
Unit review date	30/09/2014
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: E2, F3, F9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	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	01/10/2007
Unit guided learning hours	14

Additional Guidance about the Unit
Indicative Content:

1	- Nature of revenue costs and capital expenditure - Costs of products and services and costing techniques - Break-even analysis - Concept and application of marginal cost - Concept and application of standard cost - Allocating costs - Relevant costs in decision-making - Costing systems - Techniques to reduce costs - Activity Based Costing - Budgetary Control and Variance Analysis
2	- Financial evaluation techniques such as Payback, IRR, DCF, NPV, ROCE, CBA - Factors in considering and recommending revenue expenditure, including make/buy and/or employ/subcontract decisions - Effective methods to present financial information to support recommendations

Title:	Understanding the organisational environment (M5.10)
Level:	5
Credit value:	5

Learning outcomes (the learner <u>will</u>)		Assessment criteria (the learner <u>can</u>)	
1	Be able to analyse how an organisation is affected by the macro-environment	1.1	Analyse own organisation using PESTLE
		1.2	Evaluate the strengths and limitations of using PESTLE as a strategic diagnostic tool
2	Understand the impact of economic and political factors on the organisation	2.1	Assess the impact on the organisation of one economic factor from the PESTLE analysis
		2.2	Assess the impact on the organisation of one political factor from the PESTLE analysis
3	Understand the legal environment within which the organisation operates	3.1	Assess the impact on the organisation of one legal factor from the PESTLE analysis

Additional information about the unit	
Unit purpose and aim(s)	To develop knowledge and understanding of the organisational environment as required by a practising or potential middle 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: B8, D3, 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	01/10/2007
Unit guided learning hours	24

Additional Guidance about the Unit

Indicative Content:

1	- Concept and methods of conducting PESTLE analysis - Practical use of PESTLE analysis to create outline organisational profiles - The concept of appropriate access to knowledge and information within the organisation to facilitate its activities
2	- Impact of economics and politics on the organisation - Economic issues – inflation, unemployment, trade cycles, exchange rates, economic growth, price mechanism, competition, economic indicators, "factors of production" affecting business location - Governmental influence on the economy and organisational operations – fiscal, monetary, legal - Global issues and challenges for organisations - International trade – UK's key trading partners – international competition - The European Union – purpose, scope, membership and institutions - Other international organisations which have an influence on business - Exchange rates and their impact on business
3	- The English (Scottish or Irish systems as appropriate) legal system, sources of law, common law, statute and the doctrine of precedence - Nature of law, rules, sanctions, enforcement and administration. Civil and criminal law affecting business and employment - European law, Directives and their impact on UK law - The law of contract, terms and conditions, remedies for breach of contract. Legislation affecting contracts for the sale of goods and services - Product liability, Consumer Protection legislation, civic and criminal liability and enforcement - Law of agency and application to the job role - Employment law, contracts of employment, individual statutory employment rights, unfair dismissal - Legal duties in relation to sex, race and disability and unfair discrimination - Trade union law, membership rights, recognition, consultation and Workers Councils

Title:	Leading innovation and change (M5.05)
Level:	5
Credit value:	5

Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1. Understand the need for innovation and change management within an organisation	1.1	Explain the importance of innovation for own organisation
	1.2	Explain the importance of managing change within own organisation
2. Be able to propose innovative solutions to improve organisational performance	2.1	Assess an opportunity for innovation and improvement in own organisation
	2.2	Justify the improvement identified, in the context of organisational objectives
	2.3	Use a range of techniques to generate innovative options to deliver the improvement identified
	2.4	Evaluate options for generating the proposed improvement to determine feasibility and viability
3. Be able to lead and manage change within an organisation	3.1	Create a change management plan that is designed to meet stakeholders' expectations
	3.2	Implement the change management plan, monitoring progress against agreed targets

Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability of leading innovation and change as required by a practising or potential middle manager.
Unit review date	30/06/2014
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: B1, C2, C4, C5, C6, D2, F3, 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	01/10/2007
Unit guided learning hours	24

Additional Guidance about the Unit

Indicative Content:

1	• Innovation and business performance • Financial and social benefits of innovation • Radical and incremental innovation • Innovation as a form of competitive advantage • Need for effective management of change • Continuous Improvement Techniques • The difference between Kaizen (continuous or incremental change) and breakthrough change (e.g. business process re-engineering) • Leadership and change, transactional/transformational leadership and other leadership models relevant to change • Concepts of creativity and innovation and the conditions and processes required to encourage them
2	• Need for environmental scanning and organisational analyses (PESTLE, core competencies, SWOT, etc) • The nature and role of vision in the change process • Techniques for critical decision-making • Methods of determining feasibility and viability of opportunities and options, and of contingency planning • Problem solving and decision-making techniques including the use of quantitative and qualitative information • Identification of human and financial factors in the consideration of change • Techniques for monitoring and evaluating outcomes of change • Methods of assessing the risks and uncertainties associated with proposed changes
3	• Stakeholder mapping • Ways to identify stakeholders in change, and the benefits and costs to stakeholders, in order to overcome resistance • Skills and competencies required to manage innovation and change • Principles and practices associated with managing creativity and innovation • Direct and indirect effects upon other people, departments and organisations • Ways to organise and co-ordinate resources and activities to achieve planned

	change, including use of Gantt charts and network planning as tools for planning change • The role of communication in overcoming barriers and other difficulties

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

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

Additional information about the unit	
Unit purpose and aim(s)	To enable candidates to make effective decisions to solve problems in the workplace.
Unit expiry date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to 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	Business Management

subject/sector classification system	
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM
Units available from	01/07/2008
Unit guided learning hours	16

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

Title:	Managing information (M5.18)
Level:	5
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the management of information within the organisation	1.1 Critically assess information flow through a number of different channels within the organisation 1.2 Propose improvements to the flow of information within your area of responsibility, based on your organisational assessment
2 Be able to gather and analyse information to make decisions or solve problems in your area of responsibility	2.1 Collect information from a wide range of sources to support management decision-making 2.2 Analyse the information collected from a wide variety of sources, to inform decision-making 2.3 Use this analysis of information to make and justify a management decision
3 Be able to disseminate information on a management decision, through the right organisational channels	3.1 Communicate information to team members or other colleagues to meet business objectives, using appropriate organisational channels 3.2 Communicate information to stakeholders or customers to meet business objectives, using appropriate organisational channels.

Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability to be able to manage information within own organisation, as required by a practising or potential middle 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: A3, C6, F9, F11
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	
Unit guided learning hours	12

Additional Guidance about the Unit	
Indicative content:	
1	• Information flows • Information channels and knowledge networks • Ways to identify information requirements • Manual and IT systems to receive, record, process store and transfer information • Data Protection legislation and security of data • Range of source documents and IT systems • Intranets • Internet and e-business
2	• Types and sources of information about the organisation, its operations, resources, markets, suppliers, customers and competitors • Levels of managing information, e.g. corporate, department, team • Records management • Information management and Management Information Systems (MIS) • Value of valid, accurate and timely information to the organisation • Techniques for assessing the validity, accuracy and reliability of information • Constraints on the availability of and access to data • Primary and secondary research • Means of data collection and validation, including questioning, observation, surveys, source records, pilot studies and sampling • Knowledge, information and data • Indexing, referencing and structuring qualitative information • Using and interpreting information for decision making and problem solving • Data and information analysis • Decision-making models and techniques

	• Strategic, tactical and operational decision-making
3	• Internal and external organisation communication channels • Communication strategies to achieve business objectives • Choice of appropriate communication channels to achieve business objectives

Title:	Developing and leading teams to achieve organisational goals and objectives (M5.46)
Level:	5
Credit value:	4

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand the importance of leading teams to achieve organisational goals and objectives	1.1 Assess the effectiveness of own organisation in measuring team performance against organisational goals and objectives 1.2 Evaluate the role of leadership in helping teams to achieve organisational goals and objectives
2 Be able to develop and lead teams	2.1 Critically review own ability to develop and lead teams to achieve organisational goals and objectives 2.2 Implement changes to own leadership style in order to more effectively develop and lead teams

Additional information about the unit	
Unit purpose and aim(s)	To develop understanding and ability in developing and leading teams, as required by a practising or potential middle 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: B1, B6, C2, C4, C5, C6, D6, F1, F2, F11
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
Units available from	01/10/2007
Unit guided learning hours	18

Additional Guidance about the Unit	
Indicative Content:	

1	- Concepts of authority and power, responsibility and accountability - Differences between managing in public, private and voluntary sectors - Processes of delegation and empowerment - Factors influencing behaviour at work; theories of motivation and their application to individuals, including incentives and rewards - Strategies to encourage managed risk-taking and to learn from failure - The characteristics and behaviours associated with initiative, leadership, creativity and innovation, and how to foster them - Need for performance assessment, and provision of development and/or counselling where necessary - Relationship between team performance and organisational goals and objectives - The Balanced Scorecard - Quality initiatives such as TQM - Techniques to evaluate team performance - Feedback, recognition and reward techniques to support, motivate and monitor
2	- Characteristics of groups and teams, team membership and leadership - The importance of direction and values in creating effective teams - Stages in team development, use of team roles for building a balanced team - Teams in different contexts, e.g. operational, project, management, contractors, volunteers - Inter-relationships between team and individual performance and development - Factors influencing behaviour, theories of motivation and their application to teams, including reward systems, promotion, succession, and job rotation - Techniques to evaluate team performance - Techniques to review own performance, such as peer review and 360^0 feedback - Management and leadership styles and qualities - Methods to promote trust and respect within the team

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A P P E N D I X - B

ASSESSMENTS FOR MANDATORY UNITS FOR THE LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

WORK BASED ASSIGNMENT M5.15: MANAGING PROJECTS IN THE ORGANISATION

Centre Number:	Centre Name:
Learner Registration No:	**Learner Name:**

TASK

Plan and implement a project in the organisation, and use feedback from others on completion of the project to improve own performance in managing projects.

The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.

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

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Be able to manage a project in an organisation *(min 40 marks required from 80 available)*	• The usefulness of project management tools and techniques for managing a project within own organisation is assessed • The implementation of a project within own organisation is planned • The project plans are communicated with appropriate colleagues and stakeholders, gaining agreement where necessary • The project plan is implemented, monitoring progress against agreed targets
Be able to evaluate own ability to manage a project *(min 10 marks required from 20 available)*	• Feedback from others is used to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses • A self-development plan is created to improve own performance in managing projects
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.15: MANAGING PROJECTS IN THE ORGANISATION

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: ☐			

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Be able to manage a project in an organisation • The usefulness of project management tools and techniques for managing a project within own organisation is assessed • The implementation of a project within own organisation is planned • The project plans are communicated with appropriate colleagues and stakeholders, gaining agreement where necessary • The project plan is implemented, monitoring progress against agreed targets			/ 80 marks (min 40)	
Be able to evaluate own ability to manage a project • Feedback from others is used to critically evaluate own ability to plan and implement a project, identifying strengths and weaknesses • A self-development plan is created to improve own performance in managing projects			/ 20 marks (min 10)	

Assessor's decision		Quality assurance use	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/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

ASSESSMENTS FOR OPTIONAL UNITS FOR THE LEVEL 5 CERTIFICATE IN PROJECT MANAGEMENT SKILLS

WORK BASED ASSIGNMENT M5.17: MANAGING RESOURCES

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:

TASK

Assess how the physical resources for which you are accountable are managed, and plan and implement improvements to the management of physical resources for which you are accountable, ensuring compliance with organisational policies and procedures.

The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.

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

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand how to manage physical resources for which you are accountable *(min 30 marks required from 60 available)*	• The use of physical resources for which you are accountable is evaluated for effectiveness and efficiency, in line with organisational policies and procedures • The procedures for the maintenance and safe use of physical resources for which you are accountable are assessed, in line with organisational policies and procedures • The procedures for the security of resources for which your you accountable are assessed, in line with organisational policies and procedures • Opportunities for improvement in own organisation's policies and procedures for the management of physical resources are identified
Be able to plan and implement improvements for managing physical resources for which you are accountable *(min 20 marks required from 40 available)*	• Improvements to the management of physical resources for which you are accountable are informed by your evaluation and assessment and planned • Improvements to the management of physical resources for which you are accountable are implemented, ensuring compliance with organisational policies and procedures
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.17: MANAGING RESOURCES

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: ☐

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand how to manage physical resources for which you are accountable • The use of physical resources for which you are accountable is evaluated for effectiveness and efficiency, in line with organisational policies and procedures • The procedures for the maintenance and safe use of physical resources for which you are accountable are assessed, in line with organisational policies and procedures • The procedures for the security of resources for which your you accountable are assessed, in line with organisational policies and procedures • Opportunities for improvement in own organisation's policies and procedures for the management of physical resources are identified			/60 marks (min 30)	
Be able to plan and implement improvements for managing physical resources for which you are accountable • Improvements to the management of physical resources for which you are accountable are informed by your evaluation and assessment and planned • Improvements to the management of physical resources for which you are accountable are implemented, ensuring compliance with organisational policies and procedures				

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			/40 marks (min 20)	

Assessor's decision		**Quality assurance use**	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/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):**	

M4.28	Understanding financial management

Work-based Assignment

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

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

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

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

Assessment Criteria

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

WORK BASED ASSIGNMENT M5.03: MAKING A FINANCIAL CASE

Centre Number:	Centre Name:
Learner Registration No:	**Learner Name:**

TASK
Use examples to explain and classify capital, revenue and costs, and use a range of financial evaluation techniques to inform a management decision.   The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.   Check your assignment carefully prior to submission using the assessment criteria.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand financial concepts used to inform management decisions *(min 30 marks required from 60 available)*	• The differences between capital and revenue expenditure are explained, using examples • How costs are classified is explained, using examples • How costs are allocated is explained, using examples
Be able to make a financial case to inform a management decision *(min 20 marks required from 40 available)*	• A range of financial evaluation techniques are used to inform a management decision
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.03: MAKING A FINANCIAL CASE

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: ☐

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand financial concepts used to inform management decisions • The differences between capital and revenue expenditure are explained, using examples • How costs are classified is explained, using examples • How costs are allocated is explained, using examples			/60 marks (min 30)	
Be able to make a financial case to inform a management decision • A range of financial evaluation techniques are used to inform a management decision			/40 marks (min 20)	

Assessor's decision		Quality assurance use	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/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):**	

WORK BASED ASSIGNMENT M5.10: UNDERSTANDING THE ORGANISATIONAL ENVIRONMENT

Centre Number:	Centre Name:
Learner Registration No:	**Learner Name:**

TASK

Analyse own organisation using the PESTLE framework and assess the impact of the environment on the organisation.

The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.

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

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Be able to analyse how an organisation is affected by the macro-environment *(min 20 marks required from 40 available)*	• Own organisation is analysed using PESTLE • The strengths and limitations of using PESTLE as a strategic diagnostic tool are evaluated
Understand the impact of economic and political factors on the organisation *(min 20 marks required from 40 available)*	• The impact on the organisation of one economic factor from the PESTLE analysis is assessed • The impact on the organisation of one political factor from the PESTLE analysis is assessed
Understand the legal environment within which the organisation operates *(min 10 marks required from 20 available)*	• The impact on the organisation of one legal factor from the PESTLE analysis is assessed
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.10: UNDERSTANDING THE ORGANISATIONAL ENVIRONMENT

Centre Number:	Centre Name:

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Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Be able to analyse how an organisation is affected by the macro-environment • Own organisation is analysed using PESTLE • The strengths and limitations of using PESTLE as a strategic diagnostic tool are evaluated			/40 marks (min 20)	
Understand the impact of economic and political factors on the organisation • The impact on the organisation of one economic factor from the PESTLE analysis is assessed • The impact on the organisation of one political factor from the PESTLE analysis is assessed			/40 marks (min 20)	
Understand the legal environment within which the organisation operates • The impact on the organisation of one legal factor from the PESTLE analysis is assessed			/20 marks (min 10)	

Assessor's decision		Quality assurance use	
Total marks	Outcome *(circle as applicable)*	Total marks	Outcome *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/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:**
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WORK BASED ASSIGNMENT M5.05: LEADING INNOVATION AND CHANGE

Centre Number:	Centre Name:
Learner Registration No:	**Learner Name:**

TASK Identify and implement an innovation that leads to an improvement in the organisation, and manage change to monitor progress against agreed targets and meet stakeholders' expectations. The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words. Check your assignment carefully prior to submission using the assessment criteria.	
Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the need for innovation and change management within an organisation *(min 12 marks required from 24 available)*	• The importance of innovation for own organisation is explained • The importance of managing change within own organisation is explained
Be able to propose innovative solutions to improve organisational performance *(min 25 marks required from 50 available)*	• An opportunity for innovation and improvement in own organisation is assessed • The improvement identified is justified in the context of organisational objectives • A range of techniques are used to generate innovative options to deliver the improvement identified • Options for generating the proposed improvement are evaluated to determine feasibility and viability
Be able to lead and manage change within an organisation *(min 13 marks required from 26 available)*	• A change management plan that is designed to meet stakeholders' expectations is created • The change management plan is implemented, monitoring progress against agreed targets
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.05: LEADING INNOVATION AND CHANGE

Centre Number:	Centre Name:

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Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand the need for innovation and change management within an organisation • The importance of innovation for own organisation is explained • The importance of managing change within own organisation is explained			/24 marks (min 12)	
Be able to propose innovative solutions to improve organisational performance • An opportunity for innovation and improvement in own organisation is assessed • The improvement identified is justified in the context of organisational objectives • A range of techniques are used to generate innovative options to deliver the improvement identified • Options for generating the proposed improvement are evaluated to determine feasibility and viability			/50 marks (min 25)	
Be able to lead and manage change within an organisation • A change management plan that is designed to meet stakeholders' expectations is created • The change management plan is implemented, monitoring progress against agreed targets			/26 marks (min 13)	

Assessor's decision		Quality assurance use	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/REFERRAL**	**Total 50 + overall, AND minimum in each section**	**PASS/REFERRAL**
Section referral if applicable:		**Date of IQA check:**	
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ILM EV signature:		**Date externally verified (where applicable):**	

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

Work-based Assignment

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

Assessment Criteria

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

WORK BASED ASSIGNMENT M5.18: MANAGING INFORMATION

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:

TASK

Critically assess and propose improvements to the flow of information within your area of responsibility; collect and analyse information to make and justify a management decision, and disseminate information on a management decision using appropriate organisational channels.

The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.

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

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the management of information within the organisation *(min 15 marks required from 30 available)*	• Information flow through a number of different channels within the organisation is critically assessed • Improvements to the flow of information within your area of responsibility are proposed, based on your organisational assessment
Be able to gather and analyse information to make decisions or solve problems in your area of responsibility *(min 20 marks required from 40 available)*	• Information to support management decision-making is collected from a wide range of sources • The information collected from a wide variety of sources is analysed to inform decision-making • This analysis of information is used to make and justify a management decision
Be able to disseminate information on a management decision, through the right organisational channels *(min 15 marks required from 30 available)*	• Information to team members or other colleagues to meet business objectives is communicated, using appropriate organisational channels • Information to stakeholders or customers to meet business objectives is communicated, using appropriate organisational channels
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.18: MANAGING INFORMATION

Centre Number:	Centre Name:

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Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand the management of information within the organisation • Information flow through a number of different channels within the organisation is critically assessed • Improvements to the flow of information within your area of responsibility are proposed, based on your organisational assessment			/30 marks (min 15)	
Be able to gather and analyse information to make decisions or solve problems in your area of responsibility • Information to support management decision-making is collected from a wide range of sources • The information collected from a wide variety of sources is analysed to inform decision-making • This analysis of information is used to make and justify a management decision			/40 marks (min 20)	
Be able to disseminate information on a management decision, through the right organisational channels • Information to team members or other colleagues to meet business objectives is communicated, using appropriate organisational channels • Information to stakeholders or customers to meet business objectives is communicated, using				

| appropriate organisational channels | | | | /30 marks (min 15) | |

Assessor's decision			**Quality assurance use**	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/REFERRAL**	**Total 50 + overall, AND minimum in each section**	**PASS/REFERRAL**
Section referral if applicable:		**Date of IQA check:**	
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ILM EV signature:		**Date externally verified (where applicable):**	

WORK BASED ASSIGNMENT M5.46: DEVELOPING AND LEADING TEAMS TO ACHIEVE ORGANISATIONAL GOALS AND OBJECTIVES

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:

TASK

Evaluate the role of leadership and the effectiveness of measuring team performance, and implement changes to own leadership style in order to more effectively develop and lead teams.

The 'nominal' word count for this assignment is 2,500 words; the suggested range is between 2,000 and 3,000 words.

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

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the importance of leading teams to achieve organisational goals and objectives *(min 30 marks required from 60 available)*	• The effectiveness of own organisation in measuring team performance against organisational goals and objectives is assessed • The role of leadership in helping teams to achieve organisational goals and objectives is evaluated
Be able to develop and lead teams *(min 20 marks required from 40 available)*	• Own ability to develop and lead teams to achieve organisational goals and objectives is critically reviewed • Changes to own leadership style are implemented in order to more effectively develop and lead teams
By submitting I confirm that this assessment is my own work	

MARK SHEET M5.46: DEVELOPING AND LEADING TEAMS TO ACHIEVE ORGANISATIONAL GOALS AND OBJECTIVES

Centre Number:	Centre Name:

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Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand the importance of leading teams to achieve organisational goals and objectives • The effectiveness of own organisation in measuring team performance against organisational goals and objectives is assessed • The role of leadership in helping teams to achieve organisational goals and objectives is evaluated			/60 marks (min 30)	
Be able to develop and lead teams • Own ability to develop and lead teams to achieve organisational goals and objectives is critically reviewed • Changes to own leadership style are implemented in order to more effectively develop and lead teams			/40 marks (min 20)	

Assessor's decision		Quality assurance use	
Total marks	**Outcome** *(circle as applicable)*	**Total marks**	**Outcome** *(circle as applicable)*
Total 50 + overall, AND minimum in each section	**PASS/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):**	