**Level 5 Diploma for School Business Leaders**

**8391**

July 2017 Version 1.0

**Qualification Handbook**

Qualification at a glance

|  |  |
| --- | --- |
| Subject area  | Management |
| ILM number | 8391-31 (Full payment route)8391-33 (Unit payment route) |
| Age group approved | 19+ |
| Entry requirements | None |
| Assessment | Portfolio of Evidence |
| Approvals | Available from 31 July 2017 |
| Links to Professional Standards | Linked to National Association of School Business Management (NASBM) Professional Standards |
| Registration and certification | Consult the [Walled Garden/Online Catalogue](https://www.i-l-m.com/trainers-and-centres/WalledGarden-New) for last dates |

|  |  |  |
| --- | --- | --- |
| Title and level | ILM number | Accreditation number |
| Level 5 Diploma for School Business Leaders | 8391-31 (Full payment route)8391-33 (Unit payment route) |  603/1998/7 |

|  |  |  |
| --- | --- | --- |
| Version and date | Change detail | Section |
| 1.0 July 2017 | Handbook created | All |

This document is intended for current and prospective Centres of ILM and City & Guilds. All ILM qualifications are awarded by The City and Guilds of London Institute. This document should always be read in conjunction with the ILM Customer Handbook [www.i-l-m.com/handbook](http://www.i-l-m.com/handbook).

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Introduction

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

|  |  |
| --- | --- |
| Area | Description |
| Qualification aim | This qualification is aims to improve the leadership and management skills of school business management professionals across a range of disciplines, focussing on Leading Support Services, managing school finance and procurement activities. |
| Who is the qualification for? | This qualification is aimed at experienced School Business Managers looking to develop their leadership and management skills. The Level 5 Diploma will enable the individual to develop their professional learning, gain insight into the strategic dimension of their role and understand the how to lead and manage a range of functions in a school. |
| Benefits for individuals  | * Learn how to lead and manage teams in a school setting
* Develop your personal effectiveness in the role
* Understand the strategic direction of your school and contribute to strategic planning
* Develop the skills to propose and implement improvement initiatives in your school.
* Links to the NASBM Professional Standards
 |
| Benefits for employers and educators | * Professional school business staff which will enhance your school
* Supports the development of the school leadership and business team
* Allows head teachers to focus on teaching, learning and student attainment
* Helps to develop the school business team and gain specialist expertise in areas including leading support services, finance, marketing, procurement, HR and infrastructure management.
 |
| What opportunities for progression are there? | This qualification will provide progression opportunities to other qualifications such as: * ILM Level 6 Diploma in School Business Management
* ILM Level 6 Award or Diploma in Management
 |

Structure

To achieve the Level 5 Diploma for School Business Leaders learners must complete three mandatory units and one optional unit, achieving a minimum of 43 credits.

|  |
| --- |
| Level 5 Diploma for School Business Leaders |
| UAN | ILM unit number | Unit title | Level | Credit Value | GLH |
| **Mandatory Units** |
| K/615/9088 | 8391-500 | Leading Support Services in a School | 5 | 11 | 35 |
| M/615/9089 | 8391-501 | Managing School Finances  | 5 | 11 | 40 |
| H/615/9090 | 8391-502 | Managing Procurement in a School  | 5 | 11 | 40 |
| **Optional Units** |
| K/615/9091 | 8391-503 | Human Resource Management in a School | 5 | 10 | 35 |
| M/615/9092 | 8391-504 | Managing School Infrastructure | 5 | 11 | 40 |
| T/615/9093 | 8391-505 | Managing Marketing in a School | 5 | 11 | 40 |

Total qualification time (TQT)

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

TQT is comprised of the following two elements:

1. the number of hours which an awarding organisation has assigned to a qualification for guided learning, and
2. an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a Lecturer, Supervisor, Tutor or other, appropriate provider of education or training.

**Extract from: Ofqual, Total Qualification Time Criteria for All Qualifications, Section 1.8**

|  |  |  |  |
| --- | --- | --- | --- |
| **Title and level** | **GLH** | **TQT** | **Credit** |
| Level 5 Diploma for School Business Leaders | 150 -155 | 435 | 43 |

Centre requirements

Approval

Centres must ensure they are approved by ILM to offer this qualification before commencing delivery. Centres must submit a learner journey plan (formerly known as a scheme of work), lesson plans etc. Once approved, the qualification will be listed on a Centre’s Walled Garden Catalogue. Centres should liaise with their Business Development Manager to obtain add-on approval.

Resource requirements

Occupational competence requirements

Centres must demonstrate that staff who are actively involved in the delivery of the qualification meet the occupational competence requirements determined by ILM. It is also the Centre’s responsibility to inform ILM of any changes to staffing by completing and returning a [Centre Update Form (CUF)](https://www.i-l-m.com/trainers-and-centres/guides-and-resources?n=1000&q=centre&spdt=admin&tab=centresupport&oq=centre#centresupport). A curriculum vitae (CV) should be available for review by the Quality & Compliance Manager (QCM)/External Verifier (EV) if requested. Centres are responsible for updating the Centre Staffing Matrix.

Evidence of occupational competence

ILM qualifications are derived from the Regulated Qualifications Framework (RQF) Level Descriptors and are designed to develop learner’s knowledge, understanding and skills which are then assessed through a range of work related assessments.

Centre Tutors, Assessors and Internal Verifiers are therefore required as a team to have a combination of appropriate competences in learning, assessment and internal quality assurance methodologies. This must be underpinned by knowledge and experience of leadership, management and team skills within an education environment. This should be relevant to the qualifications being delivered and the learners undertaking them.

Centre staff will only be expected to meet a range of evidence indicators. The table below shows the occupational competence requirements of Tutors, Internal Verifiers and/or Assessors.

|  |  |
| --- | --- |
| Tutor occupational competence requirements | Evidence indicators |
| Relevant and sufficient occupational experience appropriate to the level and breadth of subject areas of the qualification units for which the Centre is approved. | * Current (within the last three years), credible expertise in management and leadership in a school setting relevant to the level(s)/units they are assessing or verifying.
 |
| A thorough knowledge and understanding of the subject areas appropriate to the level, breadth and content of the qualification units for which the Centre is approved. | * Qualifications in School Business Management at Level 5 or above **or**
* Substantial experience, knowledge and understanding of school business management

**and*** Have a thorough understanding of the Professional Standards for school business management and leadership at the level(s) they are delivering, assessing or verifying.
 |
| Continuing Professional Development. | * Evidence of participation over the past three years in Continuing Professional Development (CPD) to maintain their knowledge and keep themselves up-to-date with developments in management and leadership practice in a school setting.
* Desirable but not essential to have membership of a professional institute or association appropriate to the level and subject area of the qualification.
* Show evidence of participation in CPD in relation to training and learning over the past three years relevant to the level and subject area of the qualification.
 |
| Knowledge, understanding and application of a range of teaching and learning methodologies relevant to the level and subject area of the qualification units for which the Centre is approved. | * Hold a valid and recognised teaching/training qualification **or**
* Show evidence of current (within the last three years) experience of delivering training appropriate and relevant to the level and subject area of the qualification units.
* If assessing only with no delivery or training responsibilities, hold a valid and recognised assessor qualification **or**
* Show evidence of current (within the last three years) experience of assessing appropriate and relevant to the level and subject area of the qualification units.
 |
| Knowledge of ILM learning and assessment processes. | * Previous experience of delivery of ILM qualification(s) appropriate to the level and subject area of the qualification **or**
* Knowledge of the RQF (or Qualifications and Credit Framework (QCF)) and level descriptors appropriate to the level of the qualification.
 |

|  |  |
| --- | --- |
| Internal Verifier and/or Centre Assessor occupational competence requirements | Evidence indicators |
| Relevant and sufficient occupational experience appropriate to the level and breadth of subject areas of the qualification units for which the Centre is approved. | * Current (within the last three years), credible expertise in management and leadership in a school setting relevant to the level(s)/units they are assessing or verifying.
 |
| A thorough knowledge and understanding of the subject areas appropriate to the level, breadth and content of the qualification units for which the Centre is approved. | * Qualifications in School Business Management at Level 5 or above **or**
* Substantial experience, knowledge and understanding of school business management

**and*** Have a thorough understanding of the Professional Standards for school business management and leadership at the level(s) they are delivering, assessing or verifying.
 |
| Continuing Professional Development. | * Evidence of participation over the past three years in Continuing Professional Development (CPD) to maintain their knowledge and keep themselves up-to-date with developments in management and leadership practice in a school setting.
* Desirable but not essential to have membership of a professional institute or association appropriate to the level and subject area of the qualification.
* Show evidence of participation in CPD in relation to training and learning over the past three years relevant to the level and subject area of the qualification.
 |
| Knowledge, understanding and application of a range of assessment and/or internal quality assurance methodologies relevant to the level and subject area of the qualification units for which the Centre is approved. | * Demonstrate clear and sufficient evidence of current (within the last three years) experience of assessment and/internal verification appropriate and relevant to the level and subject area of the qualification.
* Have a relevant qualification in assessment and/or internal quality assurance (eg TAQA or equivalent) ­**or**
* Show evidence of current (within the last three years) experience of assessing and internal verification appropriate and relevant to the level and subject area of the qualification units.
 |
| Knowledge of ILM learning and assessment processes. | * Previous experience of delivery of ILM qualification(s) appropriate to the level and subject area of the qualification **or**
* Knowledge of the RQF (or Qualifications and Credit Framework (QCF)) and level descriptors appropriate to the level of the qualification.
 |

Learner entry requirements

ILM has not set an entry requirement for this qualification however Centres must ensure that learners are in a position to meet the assessment demands of the qualification, which are work-based and reflective in nature. As this qualification is work-based, learners must be employed in an appropriate role.

Age restrictions

ILM cannot accept any registrations for learners under 19 as this qualification is not approved for under 19s.

Time constraints

* Qualification registration is valid for three years.

Delivering the qualification

Initial assessment

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

* if the learner has any specific training needs
* support and guidance they may need when working towards their qualification
* any previous, relevant qualifications or learning where Recognition of Prior Learning can be applied
* the appropriate type and level of qualification.

Centres are required to demonstrate commitment to equal opportunities when recruiting candidates. The Customer Handbook ([www.i-l-m.com/handbook](http://www.i-l-m.com/handbook)) gives guidance in making arrangements for learners requiring reasonable adjustments or special considerations in respect of assessment. This should be done as early as possible in the programme and needs to be approved by ILM before implementation.

**Induction**

Each programme must start with a short induction of at least three hours and should include written information for learners covering:

* An outline of the qualification and the related learner support available.
* The aim of the ILM Level 5 School Business Leaders.
* Expectations of, and benefits to, the individual and where relevant, their employer.
* Format of the programme – content, hours, attendance, delivery methods, etc.
* The assessment requirements, including assessment criteria.
* Roles and responsibilities of Centre staff, learners and ILM.
* Learning and study skills, including reference to use of library, internet and any open or online learning to be used.
* Information on tutorial support, advice and guidance, equal opportunities, appeals procedures, authenticity and plagiarism, collusion and cheating.
* The Institute of Leadership & Management studying membership and benefits.

The following is recommended for this qualification:

|  |  |
| --- | --- |
| Induction  | Tutorial support |
| Three hours induction | A total of at least ten hours of tutorial support over and above the indicative guided learning hours. |

Supporting documentation and resources

The following supporting documentation and resources are available for this qualification:

|  |  |
| --- | --- |
| Description  | How to access |
| Studying membership to The Institute of Leadership of Management | <https://www.institutelm.com/membership/student-activation.html> |
| NASBM Professional Standards | <https://www.nasbm.co.uk/Standards/assets/pdf/NASBM_Professional_Standards_Document_LR.pdf>  |
| NASBM Professional Standards explained and resources | <https://www.nasbm.co.uk/Career-Development/NASBM-Professional-Standards-Interactive.aspx>  |

Assessment

Summary of assessment methods

The qualification contains three mandatory units which are assessed internally and subject to internal and external verification:

| Unit number | Unit title | Assessment method | Description | Mandatory/Optional |
| --- | --- | --- | --- | --- |
| 8391-500 | Leading Support Services in a School | Portfolio of evidence | Centre assessed | Mandatory |
| 8391-501 | Managing School Finances | Mandatory |
| 8391-502 | Managing Procurement in a School | Mandatory |
| 8391-503 | Human Resource Management in a School | Portfolio of evidence | Centre assessed | Optional |
| 8391-504 | Managing School Infrastructure  | Optional |
| 8391-505 | Managing Marketing in a School | Optional |

* To achieve a pass for this qualification, the learner must pass three mandatory units and one optional unit.
* Unit specific assessment guidance is included within each unit.

Assessment strategy

The purpose of the assessment for this qualification is to:

1. Provide a robust, valid and reliable assessment
2. Ensure that the learner is able to meet all outcomes as defined in this specification
3. Closely align to the professional standards specified by NASBM

Internal assessment

All units in this qualification are internally assessed by the Centre and subject to internal and external standards verification.

To pass each internally assessed unit the learner **must**:

* Satisfy **all** assessment criteria by providing sufficient, consistent and valid evidence
* Demonstrate that the evidence is their own.

Assessment decisions can only be determined as competent (pass) or not yet competent (refer) and the only acceptable reason for a referral is a failure to meet one or more assessment criteria.

***Portfolio-based assessment***

All units are assessed via a portfolio of evidence. Centres can choose the way evidence is gathered for each unit within the parameters provided and the assessment guidance for unit.

All assessments created by Centres must be valid, fit for purpose and based on the unit assessment criteria.

***Assessment Guidance***

Assessors must assess against the assessment criteria for each unit, however assessment guidance has been included for each assessment criterion to ensure sufficiency and provide advice. Within the guidance **must** is used to identify activities that must be completed to meet sufficiency and **may** is used where learners may use the advice to include information to enhance their answer.

***Types of evidence***

Centres can choose the way evidence is gathered to be included in the portfolio for each unit, as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria. A balance of evidence types need to be produced demonstrating learners’ competence.

Evidence for skills/competence-based assessment criteria should be produced in a school environment/context where possible. If opportunities for achievement do not exist in a school setting, and the assessment criteria doesn’t specify in a school, evidence can be gathered outside of a school/ in a non-school setting. In cases where opportunities for achievement of skills/competence-based assessment criteria aren’t possible simulation can be used, however this should be a last resort after other options have been investigated and exhausted.

Evidence for these units is likely to come from naturally occurring activities from the workplace and may include (but is not restricted to):

* Products from the learner’s work
* Records of Team Minutes/Agendas
* Direct observation of the learner’s performance by their assessor
* Outcomes from oral or written questioning
* Personal statements and/or reflective accounts
* Professional discussion
* Authentic statements/witness testimony
* Records of External Customer communications
* Written reports
* Case studies

It is preferred that learners undertaking this qualification are in an appropriate job role within a school environment. It is expected that those learners not working within a school will work with a mentor within a school to enable them to collect school specific evidence. However, some of the skills criteria are not school specific. This will allow demonstration of competencies by people in other contexts and to allow evidence of how competency will transfer into a school context. The aim of this is to avoid excluding capable, qualified candidates from other sectors who are looking to transfer into a school. This will be agreed with the Assessor prior to starting the qualification.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person’s previous experience or qualifications which have already been achieved to contribute to a new qualification. Please refer to the ILM [Recognition of Prior Learning Policy (RPL)](https://www.i-l-m.com/trainers-and-centres/customer-handbook/policies).

# **Units**

**Unit 500 Leading Support Services in a School**

|  |  |
| --- | --- |
| UAN: | K/615/9088 |
| Level: | Level 5 |
| Credit value: | 11 |
| GLH: | 35 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Leading Support Services section of the NASBM Professional Standards. |
| Unit aim: | The purpose of this unit is to provide learners with the knowledge and skills required to effectively manage support services within a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Be able to play a role in implementing and promoting strategic activity in a school

**Assessment criteria**

**The learner can:**

* 1. Assess and influence priorities and activities relating to the school strategic plan
	2. Coordinate the development and communication of the school’s vision and values, drawing from current research and practice
	3. Lead on the implementation of a strategy to ensure whole-school understanding of the need for continual improvement and change

**Depth**

1.1 Assess appropriateness and achievability of strategic priorities and activities.

 Share conclusions of assessment to influence priorities and activities.

1.2 Identify current best practice for vision and values development and communication based on research, experience and approach used by others.

Coordinate the input from relevant stakeholders, and sharing and review activities to support development of school’s vision and values.

 Coordinate the communication of the school’s vision and values to appropriate stakeholders.

 Correct channels and methods of communication for the messages.

1.3 Identify the potential benefits of continual improvement and change for the whole school.

Lead on activities that promote the methods and benefits of continual improvement across a school.

Lead on activities that ensure understanding of change in a school.

**Assessment guidance**

**The learner must:**

1.1 Assess and influence priorities and activities relating to the school strategic plan. Learners **must** use criteria to assess **both** the priorities **and** related activities within the school relating to the strategic plan. They **must** make a judgement on their importance and relevance to the plan. Learners **must** also show that they have influenced the priorities and activities which **may** include their development, review or amendment.

1.2 Co-ordinate the development and communication of the school’s vision and values, drawing from current research and practice. Learners **must** show that they have researched best practice in the development and communication of school vision and values. They **must** also co-ordinate the development, redevelopment or amendment of the school vision and values and **must** show that they have co-ordinated the communication of the vision and values using appropriate channels and methods of communication relevant to own school context.

 Learners **may** show how they have included the views of relevant stakeholders within the process and how these have been taken into account.

1.3 Lead on the implementation of a strategy to ensure whole school understanding of the need for continual improvement and change. Learners **must** show they have led on the implementation of the strategy although they may not have led on its development. They **must** show how the implementation will ensure understanding from the whole school.

Suggested evidence may come from (but is not restricted to):

Strategic plans, vision and value statements, development plans, communication plans, stakeholder communication, meeting minutes, change plans and strategies, implementation documentation which may include reports or presentations.

**Learning outcome (LO 2)**

**The learner will:**

2 Understand legislation, regulation and best practice relating to schools

**Assessment criteria**

**The learner can:**

* 1. Describe the role of the key regulatory bodies in the school environment
	2. Describe the purpose and impact of key legislation relating to schools
	3. Explain best practice in terms of adhering to legislation and regulation

**Depth**

* 1. Regulatory body purpose and remit.
	2. Overview of national policy agendas: school efficiency and effectiveness.

School improvement and raising standards.

Policies and procedures for school accountability.

School inspection regime.

National legislation impacting on schools and trusts.

DfE non-statutory guidance.

Government regulation of school system.

Theory of a self-improving system.

Researching good practice.

Knowledge transfer.

* 1. Facilitating discussions and encouraging input from across the team.

Sources of information/best practice

Managing the impact in internal stakeholders

Meeting the requirements of external stakeholders.

**Assessment guidance**

**The learner must:**

2.1 Describe the role of the key regulatory bodies in the school environment. Learners **must** show understanding of the key bodies by concentrating on their role in a school context. They **must** describe the role of at least two bodies.

2.2 Describe **both** the purpose and impact of key legislation relating to schools. Learner **must** choose at least two examples of what they consider to be the key legislation relating to schools and describe both their purpose **and** impact.

2.3 Explain best practice in terms of adhering to legislation and regulation. Learners **must** explain the sources of information for best practice and explain the role of best practice in terms of adhering to **both** legislation **and** regulation.

Suggested evidence **may** come from (but is not restricted to):

 Written reports, description and explanations, research documentation, strategic plans, school plans, school vision and values.

**Learning outcome (LO 3)**

**The learner will:**

3 Be able to lead and develop others in a school

**Assessment criteria**

**The learner can:**

* 1. Evaluate a range of leadership styles and their effectiveness in a school environment
	2. Adapt own leadership style to suit different situations
	3. Analyse development opportunities for school staff, identifying barriers to performance development
	4. Encourage and facilitate the development of others
	5. Implement strategies to overcome barriers to performance ensuring fair and equitable processes

**Depth**

* 1. Leadership styles and organisational culture

Application of models of leadership in school context

Impact of context on appropriateness of style

* 1. Impact of leadership style on individuals, teams and the organisation

Situational leadership: adaptation of style to context

Generating and responding to feedback on leadership performance

* 1. Job shadowing, mentoring, etc.

Theoretical models of professional learning

Techniques for professional learning

Professional learning communities and joint practice development

Using networks to identify professional learning opportunities

Mapping enablers and inhibitors: force-field analysis

Overcoming resistance

Negotiation skills

* 1. Concept of distributed leadership in schools

Techniques for delegating roles and tasks

Monitoring staff performance and setting targets for development

Coaching techniques

Staff supervision and support

* 1. Mapping enablers and inhibitors: force-field analysis

Overcoming resistance

Negotiation skills

Conflict resolution models

**Assessment guidance**

**The learner must:**

3.1 Evaluate a range of leadership styles and their effectiveness in a school environment. Learners **must** evaluate at least three different leadership styles and a judgement made of their effectiveness in specific school contexts.

 This **may** include departments, functions, staff roles and staff needs.

3.2 Adapt own leadership style to suit different situations. Learners **must** provide evidence that they have adapted their own style in at least two different situations.

 The leadership style **may** relate to working with individuals or teams.

3.3 Analyse development opportunities for school staff, identifying barriers to performance development. Learners **must** choose at least two staff members to work with, identifying their barriers to performance development. At least two development opportunities **must** be identified for each staff member. These development opportunities **must** then be analysed identifying each ones strengths, weaknesses and appropriateness for the staff member needs and the school context.

3.4 Encourage and facilitate the development of others. Evidence **must** be included of the development of at least two staff members. Development may include training, delegation, coaching, mentoring and staff supervision and support

 Learners **may** choose to link to the activities undertaken in AC 3.3.

3.5 Implement strategies to overcome barriers to performance. Learners **must** provide evidence of implementing at least two strategies to overcome at least two barriers.

 This **may** link to the activities undertaken in AC 3.3 and AC 3.4

Suggested evidence **may** come from (but is not restricted to):

 Written analysis and evaluation, work products showing staff development, performance development reviews and records, training and development documents, meeting records.

**Learning outcome (LO 4)**

**The learner will:**

4 Understand how data analysis and reporting can support operational effectiveness in a school

**Assessment criteria**

**The learner can:**

* 1. Explain a range of formal models related to efficiency, review and reporting
	2. Evaluate a range of statistical analysis tools that can be used in schools
	3. Use data and benchmarking to monitor performance and maintain a focus on pupil achievement.

**Depth**

* 1. Back office operations and support services in schools.

Definitions and models of operational efficiency and effectiveness.

Operational efficiency: Value for Money.

Reviewing operational structures, systems, processes and performance.

Reporting on review findings.

* 1. Collection and analysis of data in operational effectiveness.

Techniques of statistical analysis.

Defining and managing operational processes.

Techniques for measurement of operational efficiency and effectiveness.

* 1. Conditions and processes required to encourage innovation.

Assessing and analysing potential opportunities for innovation.

Measuring performance in education

Monitoring pupil attainment, progress and achievement

Use of data in measuring school performance

Benchmarking techniques

Contribution of support services to school performance

Assessment guidance

**The learner must:**

4.1 Explain a range of formal models related to efficiency, review and reporting and link to how these can support operational effectiveness in a school context. Learners **must** explain at least two formal models and must include within their answer all three aspects - efficiency, review and reporting.

4.2 Evaluate a range of statistical analysis tools that can be used in schools. Learners **must** evaluate at least two statistical analysis tools suitable for use in schools and use objective criteria to make a judgement on their effectiveness in a school context,

 This **may** include individual school requirements and operational effectiveness.

4.3 Use data and benchmarking to monitor performance and maintain a focus on pupil achievement. Learners **must** provide evidence that they have used **both** school data **and** also benchmarking to monitor **both** overall school performance **and** pupil achievement.

Suggested evidence **may** come from (but is not restricted to):

 Written explanations, evaluation documents, statistical tools, school performance and benchmarking data, a written report to governors on school performance.

**Learning outcome (LO 5)**

**The learner will:**

5 Be able to manage change and innovation in a school

**Assessment criteria**

**The learner can:**

* 1. Evaluate change management techniques that can be used to successfully deliver change in a school
	2. Manage the impact of the change process on people within a school
	3. Lead whole-school innovation projects

**Depth**

* 1. Models of change in organisations.

Tools and techniques of change management.

The nature and role of vision in the change process.

Evaluating change programmes.

* 1. Implement change management techniques to mitigate negative impacts of change without limiting the positive impacts of the change.
	2. Models of change leadership.

Managing the phases of innovation projects.

Skills and competencies required to lead innovation and change.

Techniques for monitoring and evaluating outcomes of change.

**Assessment guidance**

**The learner must:**

5.1 Evaluate change management techniques that can be used to successfully deliver change in a school. Learners **must** choose at least two change management techniques and evaluate how effective they could be in delivering change successfully in a school. The evaluation **must** use objective criteria and not just learner opinion.

5.2 Manage the impact of the change process on people within a school. Learners **must** provide evidence that they have managed the impact in a school environment and this may link to activities completed for AC 5.3.

5.3 Lead whole school innovation projects. This **must** be a real work project and not a simulation.

 Learners **may** choose to develop their own whole school innovation project or take the lead on an innovation project developed and agreed within the school. Evidence **must** be provided of all aspects of the project and this **may** include documents relating to the planning process, communication, monitoring, leadership, risk management, success criteria and evaluation. The scale of the project **may** mean that the innovation is not complete within the timescale of the qualification but evidence **must** be included that shows a substantial part of the project has been completed.

Suggested evidence **may** come from (but is not restricted to):

 Written assessment and evaluation. Innovation and change management documentation relevant to the school context and covering a range of activities within the innovation project.

**Learning outcome (LO 6)**

**The learner will:**

6 Know how Health, safety and risk are managed in a school

**Assessment criteria**

**The learner can:**

* 1. Explain the duties placed on individuals by health and safety regulation and legislation in schools
	2. Evaluate the effectiveness of processes in place for dealing with incidents and emergencies, and how well they comply with relevant legislation
	3. Evaluate safeguarding arrangements in a school, making recommendations for how these may be improved

**Depth**

6.1 Health and safety legislation: Health and Safety at Work Act (1974)

DfE guidance on health and safety in schools

Key roles and responsibilities in managing health and safety

School/trust health and safety policy

6.2 School/trust health and safety policy and procedures

How to respond to health and safety incidents

How to implement emergency procedures and disaster recovery plans

Health and safety quality assurance

Health and Safety quality accreditation frameworks

Assessing compliance with Health and Safety legislation

How to conduct a health and safety inspection

How to investigate a health and safety incident

6.3 Statutory requirements and government guidance on safeguarding in schools

Role of Disclosure and Barring Service (DBS)

Inspection of school safeguarding by Ofsted

Safer recruitment and the ‘single central record’ in school

Monitoring compliance with current requirements

Investigation of gaps between policy and practice

Identification of areas for review/development in a school’s current arrangements

**Assessment guidance**

**The learner must:**

6.1 Explain the duties placed on individuals by health and safety regulation and legislation in schools. Learners **must** explain duties required by at least two different health and safety regulations or pieces of legislation.

Learners **may** choose to include different categories of individuals such as staff, contractors, visitors, governors or parents/carers.

6.2 Evaluate the effectiveness of processes in place for dealing with incidents and emergencies and how well they comply with legislation. Learners **must** identify relevant legislation and then evaluate the strengths, weaknesses and gaps in current processes in own school context and a judgement made of the effectiveness of the processes.

6.3 Evaluate safeguarding arrangements in a school, making recommendations for how these may be improved. Learners **must** show an understanding of legal safeguarding requirements and evaluate how well school policies and practices meet the requirements. They must then make recommendations of how current policies and practice may be improved.

Suggested evidence **may** come from (but is not restricted to):

 Written explanations, health and safety legislation and policies, school processes, a report to governors on school processes.

**Unit 501 Managing School Finances**

|  |  |
| --- | --- |
| UAN: | M/615/9089 |
| Level: | Level 5 |
| Credit value: | 11 |
| GLH: | 40 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Finance section of the NASBM Professional Standards |
| Unit aim: | The purpose of this unit is to equip learners with the knowledge and skills required to manage the finances within a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Understand school financial strategy and management

**Assessment criteria**

**The learner can:**

* 1. Explain the role of financial management in schools and the importance of ensuring proper stewardship of funds
	2. Analyse the impact the external economic environment can have on school operations
	3. Explain the key focusses/considerations of a school’s strategic and financial management activities
	4. Analyse the links between financial strategy and overall school objectives
	5. Explain the financial institutions and markets which facilitate school financing
	6. Evaluate the sources of finance available to schools

**Depth**

* 1. Role of financial management.

Development of a financial strategy for a sustainable future.

Key factors in the development of a school/trust’s financial strategy.

Analysis of key factors impacting on the financial strategy.

* 1. Investigation of the economic environment of a school trust.

Analysis of national factors impacting on education funding streams.

Analysis of the local education market place.

* 1. Purpose and scope of financial management in schools.
	2. Strategic financial management.

Analysis of the strategic goals of a school/trust.

Assessment of the financial viability of the strategic goals of the school/trust.

Alignment of systems for school improvement/strategic development and financial management.

* 1. Sources of state funding for schools and trusts.

DfE guidance on national and local schemes for financing schools.

Key financial institutions involved in financing of schools.

Operation of markets impacting on the financing of schools.

Evaluation of sources of finance available to a school/trust.

* 1. Conditions of finance.

Implications for operations.

**Assessment guidance**

**The learner must:**

1.1 Explain the role of financial management in a school. Learners **must** explain the role of financial management in a school context.

 They **may** do this by explaining financial strategies, the key factors as well as making finance sustainable.

1.2 Analyse the impact the external economic environment can have on school operations. Learners **must** identify and then analyse the impact the key external economic issues that can affect school operations. A description alone will not suffice, there has to be an analysis of the impact these can have on school operations.

 This **may** include an analysis of national factors and local issues.

1.3 Explain the key focusses/considerations of a school’s strategic and financial management activities. Learners **must** show understanding of the key elements of a school’s strategic and financial management activities and be able to explain the relevance of each to the performance of the school.

1.4 Analyse the links between financial strategy and overall school objectives. Learners **must** make a judgement on how well the financial strategy links to overall school objectives. This **must** be based on objective analysis and not just reflect learner opinion.

 The learner **may** analyse the financial viability of specific strategic goals in the school/trust.

1.5 Explain the financial institutions and markets which facilitate school financing. Learners **must** explain both financial institutions and financial markets and how they facilitate school financing.

 This **may** include an explanation of the differences between Academies and local authority maintained schools. This **may** include an overview of DfE guidance on national and local schemes for financing schools.

1.6 Evaluate the sources of finance available to schools. Learners **must** identify the key sources of finance available to schools. Each key source **must** be evaluated and this **may** include the conditions of finance and any implications they may have on school operations including sustainability issues.

Suggested evidence **may** come from (but is not restricted to):

Written explanations, evaluations and analysis. Research data, and school financial documents and data.

**Learning outcome (LO 2)**

**The learner will:**

2 Understand external financial statements for schools

**Assessment criteria**

**The learner can:**

* 1. Explain the key external financial statements for schools including current statute, regulation and accounting standards
	2. Prepare the key external financial statements used by a school
	3. Explain effective working capital management techniques

**Depth**

* 1. Problem-solving and decision-making techniques in business and finance

Examples of techniques in school settings: e.g. options appraisal, prioritisation matrices, force-field analysis

Application of techniques for problem-solving and decision-making to specific business/finance issues

* 1. Apply current statute, regulation and accounting standards in the preparation of these statements.

DfE and ESFA requirements in financial reporting

Contents of annual financial statements and reports

Preparation of external financial statements by academy trusts

Independent auditing of academy trusts’ financial statements

Preparation of Consistent Financial Reporting (CFR) return to DfE by maintained schools

Current financial statutes and regulations impacting on single-entity schools

* 1. Definition of working capital

Working capital ratio (current assets/current liabilities)

Techniques for the management of working capital

Cash flow management

**Assessment guidance**

**The learner must:**

2.1 Explain the key external financial statements for schools. These **must** include all of the following: current statute, regulation and accounting standards.

 The learner **may** expand on each financial statement and explain processes and techniques relevant for use in school settings.

2.2 Prepare the key external financial statements used by a school. Learners **must** show that they have completed the key external financial statements required in a school including the application of relevant accounting standards. These **must** be in line with DfE and ESFA requirements for financial reporting.

2.3 Explain effective working capital management techniques. Learners **must** define working capital and explain techniques for the management of working capital. This **may** include the working capital ratio and cash flow management.

Suggested evidence **may** come from (but is not restricted to):

A set of year end accounts for a school including all the component parts required for submission to the DfE or LA and written explanations.

**Learning outcome (LO 3)**

**The learner will:**

3 Be able to contribute to School business/finance decisions

**Assessment criteria**

**The learner can:**

* 1. Apply techniques to facilitate problem-solving and decision-making in relation to school finance decisions
	2. Evaluate the content and structure of a business case used in a school
	3. Produce accurately costed option analysis and business cases to support school decisions
	4. Analyse the relationship between costs and school priorities

**Depth**

* 1. Problem-solving and decision-making techniques in business and finance.

Examples of techniques in school settings: e.g. options appraisal, prioritisation matrices, force-field analysis.

Application of techniques for problem-solving and decision-making to specific business/finance issues.

* 1. Explanation of a business case: purpose, structure and content.

The purpose of each section and how that information can be gathered and is used, how can this be done most effectively.

* 1. Key stages in the preparation of a business case.

Costing options for the achievement of strategic goals.

Conducting options appraisal processes.

Production of key findings to support decision-making.

* 1. Key aspects of the relationship between priorities and costs.

Aligning the school’s budget and the school improvement plan for (raising standards and attainment).

Budgetary analysis to monitor expenditure related to the strategic goals of the school/trust.

Monitoring the deployment of resources in line with the school’s priorities.

**Assessment guidance**

**The learner must:**

3.1 Apply techniques to facilitate problem-solving and decision-making. Learners **must** show how they have applied at least two techniques in relation to school finance problem solving and decisions making.

 Within their evidence, learners **may** show their understanding of a range of techniques to facilitate problem-solving and decision-making in the short, medium and long term. These **may** include, for example, options appraisals, force-field analysis, and SWOT analysis.

3.2 Evaluate the content and structure of a business case used in a school Learners **must** explain the purpose, structure and content of a chosen business case and make a judgement as to its effectiveness.

 They **may** identify the purpose of each section and how information is gathered and used.

3.3 Produce accurately costed option analysis and business cases to support school decisions. Learners **must** identify the key stages required in preparing a business case. They may expand on AC 3.2 and use a template to demonstrate costing options and the options appraisal process. The learner **must** produce at least one costed option analysis and business case and demonstrate how the key findings in the business case can be used to support decision-making.

3.4 Analyse the relationship between costs and school priorities. Learners **may** use the school improvement plan and school’s budget to analyse the relationship between costs and school priorities.

 They **may** produce a budgetary analysis to monitor expenditure related to areas of the school improvement plan.

Suggested evidence **may** come from (but is not restricted to):

Business case and cost option analysis documentation for a specific business/finance issue in school. Written evaluation and decision making documentation. School financial reports and templates.

**Learning outcome (LO 4)**

**The learner will:**

4 Be able to manage a school finance function

**Assessment criteria**

**The learner can:**

* 1. Manage a school’s finance function so that it makes a full contribution to the school
	2. Develop training programmes and materials on financial procedures to support school finance activities

**Depth**

* 1. Managing a finance function.

Managing finance/business teams.

Aligning the work of the finance function to the overall needs of the school/trust.

Leading and managing improvements in financial operations and service quality.

* 1. Development of training programmes on financial procedures.

Deployment of relevant training and facilitation techniques.

Designing materials for training sessions.

**Assessment guidance**

**The learner must:**

4.1 Manage a school’s finance function so that it makes a full contribution to the school. Within their evidence, learners **must** show how they manage a finance function in a school which **may** cover e.g. financial accounting, assessing fraud risks, probity, data analysis, due diligence. There **must** also be a clear link shown to how this contributes to the school which may include school strategies and plans.

 This **may** include an evaluation of financial operations and suggest improvements which could be made.

4.2 Develop training programmes and materials on financial procedures to support school finance activities. The Learner **must** design materials for a training session with school staff on one area of financial procedures.

 In order to develop relevant training programmes and materials, the Learner **may** identify the financial procedures required in school systems. They **may** identify how relevant training is deployed in school e.g. CPD day, manuals and handbooks, twilight training.

Suggested evidence may come from (but is not restricted to):

School financial documentation over a period of time, training materials and programmes.

**Learning outcome (LO 5)**

**The learner will:**

5 Be able to lead financial control processes in a school

**Assessment criteria**

**The learner can:**

* 1. Implement and manage effective systems of internal control, including clear financial regulations and operating procedures to secure probity
	2. Monitor overall budget implementation and performance to ensure the successful achievement of school's objectives.
	3. Co-ordinate financial and performance reporting to ensure it is effective and complies with regulatory requirements

**Depth**

* 1. Internal financial control systems in schools/trusts

Roles and responsibilities of individuals involved in control systems

Financial regulations and procedures to ensure probity

Financial delegation limits and spans of control

Effectiveness of systems of internal control

Implementation of internal control systems

* 1. No depth for this AC
	2. UK regulatory requirements for financial and performance reporting

DfE/ESFA/Charities Commission guidance on reporting requirements in maintained schools and academy trusts

CFR reporting in the maintained sector

Audited annual financial statements in academy trusts

Financial and performance reporting: annual reporting cycle

Assuring the quality of reports for different audiences

**Assessment guidance**

**The learner must:**

5.1 Implement and manage effective systems of internal control, including clear financial regulations and operating procedures to secure probity. Learners **must** show they have both implemented and conducted the ongoing management of the systems and show they have met the requirements in meeting financial regulations and ensuring probity.

 Learners **may** identify and differentiate between internal and external control systems and may create an overview template for internal financial control systems in the school/trust. They **may** identify the roles and responsibilities of key individuals with regard to internal financial controls

5.2 Monitor overall budget implementation and performance to ensure the successful achievement of school's objectives. The monitoring activity will take place over a period of time appropriate to the school context. Learners **may** produce a budget monitoring report for a key performance area within their area or responsibility.

5.3 Co-ordinate financial and performance reporting to ensure it is effective and complies with regulatory requirements. The reporting **must** be shown to be accurate robust and objective and reflect the key areas for financial and performance reporting. These **may** include UK regulatory requirements specific to schools. They **may** identify the differences in reporting requirements for Academies and local authority maintained schools.

Suggested evidence **may** come from (but is not restricted to):

Internal control documentation, budget implementation, and reporting documentation. This may be in a format to meet school requirements and may be placed in a report/presentation to stakeholders.

**Unit 502 Managing Procurement in a School**

|  |  |
| --- | --- |
| UAN: | H/615/9090 |
| Level: | Level 5 |
| Credit value: | 11 |
| GLH: | 40 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Procurement section of the NASBM Professional Standards. |
| Unit aim: | The purpose of this unit is to provide learners with the knowledge and skills required to effectively manage procurement activities in a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Understand procurement legislation applicable to schools

**Assessment criteria**

**The learner can:**

* 1. Critically analyse relevant procurement legislation and their impact on school procurement activities
	2. Explain when and how to use approved procurement frameworks appropriately

**Depth**

* 1. DfE guidance on buying for schools

Procurement legislation: Crown Commercial Service (CCS)

Framework agreements for purchasing by schools/trusts

EU Treaty obligations and procurement directives

UK Public contract regulations

Demonstrating compliance with the EU/UK legal requirements for procurement exercises

* 1. Identify approved procurement frameworks

What procurement activity would require approved frameworks be relevant to

How approved frameworks are implemented, who would be involved in this.

**Assessment guidance**

**The learner must:**

1.1 Critically analyse relevant procurement legislation and their impact on school procurement activities. Learners **must** identify procurement legislation that applies to schools – both UK **and** EU legislation **may** be included, and these **may** include: Procurement contract regulations 2015, Treaty of Rome, EU Official Journal of the European Union (OJEU). Learners **may** also include ethical procurement guidance, Public Services (Social Values) Act 2012, Modern Slavery Act 2015, Ethical Trading Initiative.

Learners **must** then critically analyse at least three pieces of legislation on how it impacts on school procurement activities.

This **may** include thinking about the strengths and restrictions that each one has and how the legislation supports effective procurement in a school and how it may restrict it.

1.2 Explain both when **and** how to use approved procurement frameworks appropriately. This **may** link to the answer provided in AC1.1 to show how frameworks operate in a school context. Learners **may** use examples from own work environment.

Suitable evidence **may** come from (but is not restricted to):

Written analysis, written explanation, presentation, and professional discussion, Legislation and examples from school procurement activities.

**Learning outcome (LO 2)**

**The learner will:**

2 Be able to manage effective procurement strategies in a school

**Assessment criteria**

**The learner can:**

* 1. Evaluate benchmarking data and plan resources and procurement priorities
	2. Implement purchasing strategies based on analysis of spend and return on investment to drive efficiencies and value for money
	3. Explain the principles of fair competition, transparency and probity when spending public money
	4. Establish processes to facilitate/ensure fair competition, transparency and probity when spending public monies

**Depth**

* 1. DfE financial benchmarking websites for schools and academies.

Consistent Financial Reporting (CFR) data and efficiency metrics.

Using benchmarking data/report card to inform procurement decisions.

Planning resources and procurement priorities.

* 1. Improving efficiency and procurement processes in schools.

Overview and benefits of purchasing strategies.

Use of spend analysis review to inform purchasing strategies.

Implementation of new purchasing strategies.

* 1. HM Treasury and National Audit Office advice on managing public money.

Principles of fairness, transparency and probity (e.g. Nolan Committee).

* 1. Application of principles to procurement processes in a school/trust.

Embedding processes to ensure that purchasing is fair, legal and open (e.g. procurement procedures, designated roles, separation of duties, internal controls).

**Assessment guidance**

**The learner must:**

2.1 Evaluate benchmarking data and plan resources and procurement priorities. Learners **must** use relevant benchmarking data (eg DfE benchmarking websites, School efficiency metric tool), and **may** also use performance data (RAISE, Fischer Family Trust) for their evaluation of the school procurement needs. The evaluation **must** be clearly linked to the data as a description or learner opinion will not be sufficient.

 From the evaluation, learners **must** plan **both**

* Resources that need to be provided to meet the needs of the school
* Priority areas for procurement of resources

2.2 Implement purchasing strategies based on analysis of spend and return on investment to drive efficiencies and value for money. Learners **must** identify two purchasing strategies and carry out an analysis of spending and return on investment on the two strategies. They **must** then show that the strategies have been implemented.

 They **may** use tools and techniques such as the Kraljic model and management of risk through use of risk register. Learners **may** use sources such as DfE, and Audit Commission, when considering financial efficiency in a school.

2.3 Explain the principles of fair competition, transparency and probity when spending public money. Learners **must** explain the principles of **all three** areas. Learners **may** choose to select the legal frameworks that are applicable to their school setting and **may** include relevant legal and ethical requirements such as the Treaty of Rome. Public Services (Social Values) Act 2012, Ethical Trading Initiative, Nolan Committee 1996, Companies Act 2014.

2.4 Establish processes to facilitate/ensure fair competition, transparency and probity when spending public monies. Learners **must** provide information about processes that they use in their school so that fair competition, transparency and probity when spending public monies are applied in practice – all three areas **must** be included. Learners **may** wish to use evidence from AC 2.3 to support this.

Suggested evidence **may** come from (but is not restricted to):

Written explanation and description. Report to governors/trust board. Written processes suitable for including in procurement guidance for a school. Work processes and documentation, legislative documents.

**Learning outcome (LO 3)**

**The learner will:**

3 Understand the process of tender management

**Assessment criteria**

**The learner can:**

* 1. Analyse how the phases of the tendering process can ensure value for money is achieved within the context of a whole school value for money (VfM) strategy
	2. Explain how to create criteria and specifications that ensure effective like-for-like evaluations can be achieved and fit for purpose options chosen

**Depth**

* 1. Phases including:
* Preparing specifications, managing invitation-to-tender documents and subsequent decisions.

Including activities such as:

* Calculation of whole-life cost of goods, works and services.
* Assessment of cost against spending thresholds.
* Selection of appropriate procurement processes.
* Preparation of invitation to tender documentation.
* Management of selected procurement process.
	1. Good practice.

Characteristics of criteria and specifications that ensure suitable evaluations and comparisons can take place effectively.

**Assessment guidance**

**The learner must:**

3.1 Analyse how the phases of the tendering process can ensure value for money is achieved. Learners **must** analyse each step of the tendering process and indicate how well each of those steps ensures value for money. An appropriate framework such as the 4 E’s **may** be used. Learners **may** also wish to use relevant government policy e.g. Audit commission to support their analysis.

3.2 Explain how to create criteria and specifications that ensure effective like-for-like evaluations can be achieved and fit for purpose options chosen. Learners **may** include how evaluation of tenders is managed through a range of evaluation models e.g. Most Economically Advantageous Tender (MEAT) – Value for money through Total Acquisition Cost. Kraljic model. The use of evaluation models to manage risk **may** also be included. Learners **may** explain how the models can be used to support the creation of criteria and specifications that ensure effective evaluations can take place.

Suggested evidence **may** come from (but is not restricted to):

Written explanation and analysis, Framework documents and evaluation models.

**Learning outcome (LO 4)**

**The learner will:**

4 Be able to manage contractor and supplier activity in a school

**Assessment criteria**

The learner can:

* 1. Critically assess best practice in contract award and management
	2. Identify contract terms and conditions which could impose unfair conditions or penalties, or are unenforceable, seeking professional advice where required
	3. Establish contract terms and conditions as appropriate for a range of procurement exercises
	4. Implement processes to allow the continuous monitoring of suppliers, including their contracts, Service Level Agreements (SLAs) and Key Performance Indicators (KPIs)
	5. Manage all established contracts to ensure terms are met, and deliverables and timescales are achieved

**Depth**

* 1. Accessing guidance and best practice in awarding and managing contracts (e.g. National Audit Office).

Sources of appropriate external advice on contract award and management.

Techniques for assessing best practice in contract award and management and its applicability to a specific school/trust setting.

* 1. Contractual terms and conditions which may be unfair and/or unenforceable

Seek internal or external professional guidance.

Identifying unfair/unenforceable terms and conditions in specific contracts.

* 1. The purpose of contractual terms and conditions.

Contents and examples of contract terms and conditions.

Drafting contract terms and condition for procurement exercises.

* 1. Purposes of continuous monitoring of suppliers: ensuring KPIs and SLAs are met, contracts are fulfilled, for benchmarking, quality assurance and value for money (VfM).

Techniques for continuous monitoring of suppliers.

Implementation of continuous monitoring processes.

* 1. Creating an inventory of a school/trust’s contracts.

Scheduling assessment and review of supplier performance against contractual requirements.

Instigating review of supplier performance against contractual requirements (as set out in the service level agreement).

Identifying and tackling underperformance by contractors in relation to service agreements and KPIs.

Liaison with contractors.

Strategies to secure improvements in standards of service delivery.

**Assessment guidance**

**The learner must:**

4.1 Critically assess best practice in contract award and management. Learners **must** demonstrate knowledge and understanding of best practice in **both** contract award **and** management using relevant government guidance. Learners **must** then complete a critical assessment by determining criteria and making a judgement on the effectiveness and ease of use of the best practice.

 This **may** include consideration of the practical applicability of the best practice in their school setting.

4.2 Identify contract terms and conditions which could impose unfair conditions or penalties, or are unenforceable, seeking professional advice where required. Learners **must** identify at least two specific terms and conditions which either could impose unfair conditions or penalties, or are unenforceable, identifying the reason for this. Learners **must** also identify who they may seek guidance from.

Learners **may** consider the contribution and limitations of the role of the School Business Manager in the identification of unfair/unenforceable terms and conditions in specific contracts and contract enforcement.

4.3 Establish contract terms and conditions as appropriate for a range of procurement exercises. Learners must give examples from at least 3 activities. For each specific procurement exercise, learners **must** give examples of the contract terms and conditions, explaining why these have been included, their purpose and why they are appropriate.

4.4 Implement processes to allow the continuous monitoring of suppliers, focussing on their contracts, SLAs and KPIs. Learners **must** implement processes to show effective continuous monitoring and **must** be shown to take place over a period of time relevant to the needs of the workplace.

 Links **may** be made to relevant frameworks, tools and techniques, e.g. benchmarking, Value for Money.

4.5 Manage all established contracts to ensure terms are met, and deliverables and timescales are achieved. Learners must show they manage established contracts and this may include;

* Key Dates
* Costs and payment terms
* Notice period
* Key terms and conditions
* Penalty clauses
* Contractor contact and liaison
* Monitoring and review of supplier performance
* Resolving underperformance
* Strategies for improvement

 Suitable evidence **may** come from (but is not restricted to):

 Written report to governors/trust board. Presentation, professional discussion. Written processes that could be included in contract management guidance for a school. Draft contract log, monitoring documentation.

**Unit 503 Human Resource Management in a School**

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| --- | --- |
| UAN: | K/615/9091 |
| Level: | Level 5 |
| Credit value: | 10 |
| GLH: | 35 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Human Resources section of the NASBM Professional Standards. |
| Unit aim: | The purpose of this unit is to provide learners with the knowledge and skills to manage human resources in a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Understand the role of Human Resource (HR) management and legislation in a school

**Assessment criteria**

**The learner can:**

* 1. Analyse how the HR climate and culture in the school impacts on employee motivation, wellbeing and performance
	2. Explain relevant and current employment and discrimination law including diversity
	3. Explain how the school can mitigate risks related to employment and discrimination law
	4. Evaluate communication needs and approaches at managerial and school level

**Depth**

* 1. Concepts of organisational culture and climate.

Intrinsic and extrinsic sources of employee motivation.

Employee wellbeing and performance.

Impact of organisational culture and climate.

* 1. Scope of employment law in the UK.

UK Equality Act (2010).

Safeguarding legislation and DfE guidance.

Equal opportunities, discrimination, diversity and inclusion.

Impact of leaving EU on UK employment legislation.

* 1. Areas of risk in the management of human resources in schools/trusts.

Assessment of HR-related risks in schools/trusts.

Management of HR-related risks in school/trusts.

* 1. Theory of employee communication in HR.

Developing an employee communications strategy.

Employee engagement and consultation.

Analysing needs and preparing specific communication plans.

**Assessment guidance**

**The learner must:**

1.1 Analyse how the HR climate and culture in the school impacts on employee motivation, wellbeing and performance. Learners **must** identify the HR climate **and** culture within their school and then analyse how much they both impact on employee motivation, wellbeing and motivation. All three aspects **must** be included.

1.2 Explain relevant and current employment and discrimination law including diversity. Learners must include at least one example of **both** employment **and** discrimination law that is relevant to school context and **must** include reference to diversity.

1.3 Explain how the school can mitigate risks related to employment and discrimination law. This **may** follow on from the explanation contained in AC 1.2. Learners **must** ensure they explain how at least two risks can be mitigated.

1.4 Evaluate communication needs and approaches at managerial and school level. Learners **must** identify HR communication needs at **both** managerial **and** school levels. They **must** then evaluate approaches to meet these needs and make a judgement as to how effective and appropriate they are.

 This **may** include communication plans and strategy, employee needs and engagement, consultation and communication methods.

Suggested evidence **may** come from (but is not restricted to):

Written explanations, analysis and evaluation, legislation research, risk mitigation plans, communication plans that could be presented to Governors.

**Learning outcome (LO 2)**

**The learner will:**

2 Know how to undertake workforce planning activities in a school

**Assessment criteria**

**The learner can:**

* 1. Analyse relevant employment law, regulations and policy affecting recruitment and exit
	2. Develop a recruitment plan that’s based on the staffing needs of the school
	3. Explain how to build and use a process of induction, assessing the value it offers
	4. Explain how to create a situational succession plan
	5. Assess the need for succession plans in different areas of the school, identifying best-fit approaches for each instance

**Depth**

* 1. UK employment legislation.

Specific areas of legislation: selection and recruitment, (unfair) dismissal, redundancy and retirement.

Case law on dismissals, redundancy, etc.

* 1. Staffing needs should be informed by the SDP and include potential recruitment options.

Principles and procedures of recruitment planning.

Analysing strategic development plans to determine staffing requirements.

Assessing staffing requirements to determine recruitment plans.

* 1. The purposes of induction.

Overview of induction processes.

Development and implementation of new induction processes.

Assessing value for money on an induction process.

* 1. Overview of principles and processes of succession planning.

Range of potential activities in succession plans.

Designing a succession plan to meet the needs of a school/trust.

* 1. Differing requirements of each area.

How plans may need to differ and why.

Benefits that can be created for each area.

**Assessment guidance**

**The learner must:**

2.1 Analyse relevant employment law, regulations and policy affecting recruitment and exit. Learners must analyse legislation, regulation and policy as to how they affect **both** recruitment and exit practices within their organisation.

2.2 Develop a recruitment plan that’s based on the staffing needs of the school.

The format of the plan **may** be designed by the learner or in the format used by the school. The plan **must** cover a period of time appropriate to the school needs. The plan **may** link to the staff development plan, workforce current and future plans, pupil numbers, staff structure and strategies.

2.3 Explain how to build and use a process of induction, assessing the value it offers. The development and content of the induction process **and** how it is used **must** be explained. Learners **must** explain how the assessment of the value it offers would be conducted in their school highlighting the areas of most importance.

2.4 Explain how to create a situational succession plan. Learners **may** use an example from own workplace to show how succession planning takes place, what it contains and how it is documented.

2.5 Assess the need for succession plans in different areas of the school, identifying best fit approaches for each instance. Learner **must** assess the need for at least two different school areas identifying the best approach for each area.

 This **may** include how plans may differ for different areas and why, different requirements and the benefits of succession plans for each area.

Suggested evidence may come from (but is not restricted to):

Written explanation, professional discussion, assessment documentation and research documents, staff structures, recruitment and succession plans, induction documentation.

**Learning outcome (LO 3)**

**The learner will:**

3 Know how to manage a school’s staff structure

**Assessment criteria**

**The learner can:**

* 1. Critically evaluate a school’s existing staff structure, providing recommendations for improvements where appropriate
	2. Explain the process for developing a business case for proposed staff structure changes in line with the School Development Plan (SDP) and frameworks that support this
	3. Analyse the school's organisational culture and the impact this could have on the implementation of changes to staff structure.
	4. Create plans to monitor the success and impact of proposed changes to staff structure

**Depth**

* 1. Fitness for purpose, does it meet the needs of the school and its stakeholders.

How does it contribute to achievement of school vision and values, and learning outcomes.

* 1. Components for building a business case for organisational structuring.

Researching key data-sets in building a business case.

Frameworks for presenting a business case.

* 1. Theory and models of organisation culture.

Application of models of organisation culture to school/trust settings.

Impact of organisational culture on restructuring.

Adopting and adapting change strategies in the light of organisation culture.

* 1. Clear metrics for success.

Including the information required to monitor and measure impact and outcomes.

**Assessment guidance**

**The learner must:**

3.1 Critically evaluate a school’s existing staff structure, providing recommendations for improvements where appropriate. Learners **must** research their school staff structure and then evaluate its fitness for purpose. This evaluation **must** include criteria which will allow a judgement to be made. These criteria will be appropriate for the school context and **may** include links to school vision and mission, pupil achievement, school management and effectiveness and the staff development plan (SDP)

Finally at least one improvement to the school structure **must** be proposed and this will link clearly to the evaluation.

3.2 Explain the process for developing a business case for proposed staff structure changes in line with the staff development plan (SDP) and frameworks that support this.

This **may** link to the improvements proposed in AC 2.1

Learners **must** explain the process for the development of the business case with a clear link to the staff development plan.

Learners **may** choose to develop a business case as an example within own context

3.3 Analyse the school’s organisational culture and the impact this could have on the implementation of changes to staff structure. Learners **must** analyse the school’s organisational culture which **may** include school vision and mission, working practices, staff structure, working strategies, communication plans. They **must** then analyse how this culture will impact on any implementation of changes to staff structure.

3.4 Create plans to monitor the success and impact of proposed changes to staff structure. Plans **must** include ways of monitoring the changes at intervals appropriate to the needs of the organisation. Plans **must** also include criteria that can measure the success and impact of the changes.

 The plans **may** be in a format already in use within the organisation or designed by the learner.

Suggested evidence **may** come from (but is not restricted to):

Written explanations, professional discussion, Q & A, business case documentation, organisational information and success and impact plans. These could be in a format that could be used to present to the governing board.

**Learning outcome (LO 4)**

**The learner will:**

4 Understand Performance Management (PM) in a school

**Assessment criteria**

**The learner can:**

* 1. Evaluate the drivers of individual performance in a school and how they can be effectively managed
	2. Analyse reward options in a school and the implications of these on budgets
	3. Develop a learning needs analysis at individual, team and functional levels, incorporating diversity and inclusion

**Depth**

* 1. Performance drivers and what these are in schools.

The metrics they’re based on.

* 1. Key principles of reward systems.

Types of reward and benefit systems.

Use of reward systems to recruit, engage and retain employees.

Design of reward systems.

Role of rewards systems in improving performance.

Costing reward systems and measuring their impact.

* 1. Identification of employees’ development needs.

Use of performance appraisal processes to determine development needs.

Other techniques to identify the development needs of individuals and teams and functional sections of the organisation.

Addressing issues of diversity and inclusion in learning needs analysis.

Collation of information about training and development needs.

**Assessment guidance**

**The learner must:**

4.1 Evaluate the drivers of individual performance in a school and how they can be effectively managed. Learners **must** evaluate the performance drivers from two individuals making a judgement on how well these expectations can be managed in a school environment.

 This **may** include how the drivers relate to the requirements of the school, whether these expectations can be met, what barriers there may be to meeting these drivers, what the impact of meeting/not meeting these individual drivers may be.

4.2 Analyse the reward options in a school and the implications of these on budgets. The analysis **must** include at least two reward options and include implications on the school budget.

 This **may** include different reward options such as for recruitment, retention, improving performance and design options.

4.3 Develop a learning needs analysis at individual, team and functional levels, incorporating diversity and inclusion. The learning needs analysis **must** be completed for individuals with subsequent collation of information to form analysis for **both** teams **and** functional levels. It **must** be clear from the documentation that diversity and inclusion issues have been addressed as part of the analysis and that the learning needs relate to the requirements of the school.

 Learners **may** use a learning needs analysis document currently in use within their school or design their own document

Suggested evidence **may** come from (but is not restricted to):

Written evaluation and analysis, work products including learning needs analysis, performance reviews, reward examples in school context.

**Unit 504 Managing School Infastructure**

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| --- | --- |
| UAN: | M/615/9092 |
| Level: | Level 5 |
| Credit value: | 11 |
| GLH: | 40 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Infrastructure section of the NASBM Professional Standards. |
| Unit aim: | The purpose of this unit is to equip learners with the knowledge and skills required to lead and manage infrastructure activities in a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Be able to review and manage school asset management activities

**Assessment criteria**

**The learner can:**

* 1. Analyse the need for effective asset management in a school
	2. Evaluate the efficiency of asset management systems currently in place
	3. Evaluate the extent to which an existing asset management plan helps optimise learning outcomes across the school
	4. Develop a detailed asset register and establish processes to effectively maintain it
	5. Assess a school’s future improvement and maintenance needs
	6. Critically evaluate current processes for disposal and acquisition of school assets, recommending improvements where appropriate

**Depth**

* 1. Principles of asset management.

Good practice in asset management policies and procedures.

* 1. No indicative content for this AC.
	2. Asset management plans.

Relation between effective asset management and student learning in schools and trusts.

* 1. Role and content of asset registers in schools/trusts.

Formats and software for asset registers.

Processes required to develop a detailed asset register.

* 1. Key factors impacting on the assets of the school/trust.

Assessing maintenance needs and future requirements in the assets of the school/trust.

* 1. DfE guidance on acquisition of school/trust assets: procurement regulations.

Procedures for the acquisition of school/trust assets.

DfE guidance on disposal of assets in maintained schools and academies.

Disposal of assets: school/trust policies.

Procedures for write off/disposal of the assets of a school trust.

**Assessment guidance**

**The learner must:**

1.1 Analyse the need for effective asset management in school. Learners **must** give an analysis of why asset management needs to be effective in a school – a description of asset management will not be sufficient on its own.

 Learners **may** support their analysis by referencing good practice guidelines and the development of appropriate policies and procedures in line with the relevant regulation for their school e.g. SFVS, LA Audit or Academies financial handbook.

1.2 Evaluate the efficiency of asset management systems currently in place. Learners **must** make an evaluation of how efficient the current asset management systems in school are, giving evidence to support their view – a description or learner opinion will not be sufficient.

 Learners may draw on the good practice guidance and financial regulations from

 AC 1.1 as a benchmark on which to base their evaluation.

1.3 Evaluate the extent to which an existing asset management plan helps optimise learning outcomes across the school. Learners **must** use an existing asset management plan and evaluate its effectiveness in optimising learning outcomes in a school – a description of how it should support teaching and learning is not sufficient. Learners **may** wish to draw on links between School improvement/development planning, budget planning and the asset management plan to consider how effectively the three are linked so that premises and physical assets provide a suitable environment for teaching and learning and support the aims of the school.

1.4 Develop a detailed asset register and establish processes to effectively maintain it.

 The essential contents of an asset register (such as evidence of purchase value, deprecation, and required annual checks) **must** be developed. Learners **must** establish the processes required to maintain an asset register in line with relevant regulations for their school e.g. SFVS. LA Audit or Academies Financial Handbook

 This evidence **may** include both physical assets (inventory) and plant assets (premises register). Learners **may** consider the strengths and weaknesses of different formats and methods used for asset registers, such as school base spreadsheets or specialist commercial databases.

1.5 Assess a school’s future improvement and maintenance needs. Learners **must** make an assessment which is based on evidence rather than learner opinion. Learners **may** wish to use the contents of school improvement/development plans, conditions and suitability surveys to do this. Recommendations for priorities for future improvement and maintenance needs **must** support the assessment.

1.6 Critically evaluate current processes for disposal and acquisition of school assets, recommending improvements where appropriate. The evaluation **must** identify both strengths and weaknesses of the current processes and make recommendation for improvements to processes.

 The evaluation **may** use relevant guidance such as that from the DfE and benchmark information. It **may** include improvements to current processes or putting in place processes that do not currently exist in school.

Suggested evidence **may** come from (but is not restricted to):

Written explanation and description. Report to governors, briefing for site staff, Draft template for asset registers including disposal and acquisition

**Learning outcome (LO 2)**

**The learner will:**

2 Be able to review and plan the use of space by a school

**Assessment criteria**

**The learner can:**

* 1. Analyse the current and future space needs of a school to ensure that use of existing space is optimised and any potential deficits identified
	2. Evaluate whether school space requirements will be met by current plans
	3. Develop a medium to long-term strategy to ensure the school’s space needs are met

**Depth**

* 1. DfE base designs and area guidelines for maintained schools

DfE advice on standards for school premises

Managing the space needs of a school/trust

* 1. No indicative content for this AC.
	2. Strategic facilities planning

Development of medium to long-term strategies for the use of school/trust space

**Assessment guidance**

**The learner must:**

2.1 Analyse the current and future space needs of a school to ensure that use of existing space is optimised and any potential deficits identified. Learners **must** give an analysis of both current and future needs - a description is not sufficient.

 Learners **may** draw on evidence such as DfE standards and area guidelines to assess current use and sufficiency of space, using school evidence such as premises plans and sufficiency surveys to make their assessment. National/local and school level policies and plans such as curriculum changes, changes to school status and potential changes to the curriculum **may** be used when assessing future space needs.

2.2 Evaluate whether school space requirements will be met by current plans. Using the analysis from AC 2.1 learners **must** evaluate whether current plans for use of space will meet the future requirements. A description of current plans will not be sufficient.

 Learners **may** use appropriate school/trust base plans such as a strategic facilities plan/school improvement plan as part of their evaluation. Recommendations for improvements in current plans to meet space requirements **may** be made.

2.3 Develop a medium to long-term strategy to ensure the school’s space needs are met. From the evaluation in AC 2.2, learners **must** develop a strategy for the medium to long term.

 Learners **may** draw on principles and processes of strategic facilities planning in order to present a strategy. The strategy **may** indicate how the aims will be achieved and how they align with government or local policies.

Suggested evidence **may** come from (but is not restricted to):

Written explanation, description and evaluation. Report or presentation to governors/trust board on current and future space needs.

**Learning outcome (LO 3)**

**The learner will:**

3 Be able to lead on strategic capital planning in a school

**Assessment criteria**

**The learner can:**

* 1. Critically analyse the processes used to review and develop expansion and improvement plans, as well as condition surveys.
	2. Evaluate capital planning strategies that will allow the school to achieve its long-term capital plans.
	3. Develop a long-term capital plan for the school that facilitates effective use and management of school capital.

**Depth**

* 1. Expansion and improvement plans.

Content of plans: e.g. cyclical maintenance works, planned capital improvement works, major capital projects.

Techniques for the review and development of plans.

* 1. Potential strategies that could be used, those most applicable to broader school context and those that will be most effective in individual setting.

Evaluation should include this a recommendation of the most appropriate strategy.

* 1. Purpose and content of long-term capital plans.

Long-term capital planning process.

Use of relevant information about the school/trust’s current assets (e.g. sufficiency and lifespan of assets, needs assessment and gap identification).

Identification of performance gap and review of strategies to fill that gap.

Presentation of a long-term capital plan.

**Assessment guidance**

**The learner must:**

3.1 Critically analyse the processes used to review and develop expansion and improvement plans, as well as condition surveys. Learners **must** analyse current processes used in a school/trust giving both strengths and weaknesses -a description of current processes will not be sufficient. Learners will draw conclusions about the characteristics and effectiveness of current processes.

 Financial resources for strategic capital plans **may** also be included. Learners **may** also wish to include the School business manager’s role in these processes.

3.2 Evaluate capital planning strategies that will allow the school to achieve its long-term capital plans. Learners **must** identify school capital planning strategies that are used to achieve the capital plans. The strategies **must** then be evaluated and a judgement made as to how well they contribute to the achievement of the capital plans.

 Learners **may** wish to consider the school’s strategic goals and the contribution that the plans will make to the overall strategic direction of the school/trust.

3.3 Develop a long-term capital plan for the school that facilitates effective use, and management of school capital. Using relevant internal (e.g. condition and suitability surveys, sufficiency and lifespan of assets) and external (e.g. national or local policy, demographics) information about a school, learners **must** develop a long term capital plan that shows the effective use **and** ongoing management of school capital. Learners may use findings from AC 2.2 and 2.3 if this is appropriate.

Suitable evidence **may** come from (but is not restricted to):

Written evaluation, report to governors on planning strategies. Outline business case for the strategic capital initiative selected.

**Learning outcome (LO 4)**

**The learner will:**

4 Be able to manage capital projects in a school

**Assessment criteria**

**The learner can:**

* 1. Produce reports on detailed options and cost–benefit analysis to provide assets that meet service needs and provide the best value for money (VfM).
	2. Manage capital projects to ensure that they are delivered on time and on budget

**Depth**

* 1. Planning capital projects in schools

Planning processes to address performance gaps and meet service needs

Options appraisal process

Costing capital projects and cost-benefit analysis

Securing value for money in capital projects

Options for procurement of capital assets, including collaborative procurement approaches

* 1. Managing capital projects in schools

Planning consents and building control

Internal approval of proposed capital projects

Use of external expertise in managing capital projects (e.g. building surveyor, school buildings project management specialist)

Appointment of, and liaison with, contractors (including specialist works)

Health and safety factors in the management of capital projects

Monitoring construction schedule and costs

Handover: practical completion and defects liability period

Post-occupancy evaluation

**Assessment guidance**

**The learner must:**

4.1 Produce reports on detailed options and cost–benefit analysis to provide assets that meet service needs and provide the best value for money (VfM). Learners **must** carry out an options appraisal and select at least two options, giving a rationale for the choice. Learners **must** then carry out a cost benefit analysis for the selected options with a judgment made on how well they will meet service needs and provide VfM.

4.2 Manage capital projects to ensure that they are delivered on time and on budget. Learners **must** provide evidence that they have managed a capital budget. They **may** show they have used project management tools, included reference to appropriate approval and consents (internal and external e.g. building regulations, planning consent), monitored contractors, construction schedules and costs, conducted handover and post occupancy evaluation include snagging issues and how these were resolved. The role of the school business manager and the need for external expertise **may** be included.

Suitable evidence **may** come from (but is not restricted to):

Written report, options appraisal and cost benefit analysis, all documentation relating to managing a capital project.

**Learning outcome (LO 5)**

**The learner will:**

5 Be able to manage resources and facilities in a school

**Assessment criteria**

**The learner can:**

* 1. Evaluate the use of resources and facilities, making recommendations for improvements, to optimise learning outcomes across the school
	2. Develop a plan to optimise energy efficiency in a school
	3. Develop a maintenance plan for a school’s resources and facilities

**Depth**

* 1. Contribution of a school/trust’s resources and facilities to optimising learning outcomes

Frameworks for the assessment of the use of school resources and facilities to promote learning

Suitability surveys, sufficiency and condition surveys

Methods of assessment of the use of school facilities (e.g. class and observation checklists)

Preparation of recommendations for improvement to school/trust resources and facilities

* 1. Benefits of energy efficiency in facilities management

Government and sector guidance on energy efficiency in schools (e.g. Carbon Trust)

Reducing energy costs and consumption in schools/trusts

School/trust energy policies and staff awareness programmes

Analysing data gathered in relation to the energy efficiency of a school

Acting on findings from data-analysis to ensure delivery of optimal

* 1. Impact of effective and ineffective maintenance programmes on a school/trust

Developing a facilities maintenance plan

Planning, implementing, and evaluating effective maintenance programs

Planned preventative maintenance

Extending maintenance cycles

Scheduling maintenance tasks

**Assessment guidance**

**The learner must:**

5.1 Evaluate the use of resources and facilities, making recommendations for improvements, to optimise learning outcomes across the school. Learners **must** evaluate the current use of **both** resources **and** facilities so that at least two objective recommendations for improvements emerge from the evaluation.

Within the evaluation learners **may** use appropriate documents, e.g. suitability survey, conditions survey and relevant tools and techniques. Learners **may** also use performance indicators (RAISE, Progress 8, Fischer Family trust) when considering learning outcomes.

5.2 Develop a plan to optimise energy efficiency in a school. Learners **may** draw on relevant government and sector guidance e.g. Carbon Trust, Eco Schools and **may** consider alternative energy sources e.g. solar panels, rainwater for use in toilets. Learners **may** also use energy data from the school.

 From the research, a plan to optimise energy efficiency in a school, **must** be developed.

5.3 Develop a maintenance plan for a school’s resources and facilities. Learners **must** develop a plan that includes **both** resources **and** facilities. The plan will cover the period of time relevant to the school requirements.

 Learners **may** use a plan format already in use within the school or design their own. Learners **may** include legal obligations and potential consequences of not fulfilling those obligations. They **may** include the planning, implementation and evaluation. Learners **may** wish to consider the timing of maintenance tasks throughout the year and how these will be scheduled to ensure business continuity and management of contractors working on site. Appropriate documents e.g. premises plans, **may** be used to produce a maintenance plan which includes all statutory, good practice and preventative requirements.

Suggested evidence **may** come from (but is not restricted to):

 Written analysis and reports. Presentation for governors/trust board of a maintenance plan. Energy and maintenance plans.

**Learning outcome (LO 6)**

**The learner will:**

6 Be able to plan Information and Communication Technology (ICT) usage to support school activities

**Assessment criteria**

**The learner can:**

* 1. Develop and promote a strategic ICT plan across the school to support teaching, learning and business management processes.

**Depth**

6.1 Strategic approaches to ICT planning.

Role of ICT in supporting teaching and learning.

Role of ICT in supporting business management processes.

Key factors in ICT plans: e.g. reliability, coherence, accessibility, affordability, sustainability.

Developing and promoting ICT plans.

**Assessment guidance**

**The learner must:**

6.1 Develop and promote a strategic ICT plan across the school to support teaching, learning and business management processes. A plan **must** be developed which is suitable for a specific school setting, and **must** clearly link to the support of teaching, learning and business management processes. Learners **must** also show they have promoted the plan which **may** take the form of a report to governors or senior management team.

Learners **may** wish to take into account key factors for the design, installation and safe use of an ICT infrastructure and relevant government policy or legislation. Learners may use reputable sources such as DfE and HSE to establish this information and may also include the use, disposal and refresh of current equipment and also the affordability and sustainability of the plan.

Suitable evidence **may** come from (but is not restricted to):

Written Report, Production of an ICT plan. Presentation to governors/trust board.

**Unit 505 Managing Marketing in a School**

|  |  |
| --- | --- |
| UAN: | T/615/9093 |
| Level: | Level 5 |
| Credit value: | 11 |
| GLH: | 40 |
| Relationship to Standard: | This unit has been written to cover core elements of Tier 3 of the Marketing section of the NASBM Professional Standards. |
| Unit aim: | The purpose of this unit is to equip learners with the knowledge and skills required to lead and manage marketing activities within a school. |

**Learning outcome (LO 1)**

**The learner will:**

1 Be able to develop a school marketing strategy

**Assessment criteria**

**The learner can:**

* 1. Develop a marketing and communication strategy, with specific aims, to deliver the school’s mission and goals
	2. Lead on the development of a strategic plan for pupil recruitment to ensure sustainability of the school
	3. Evaluate the impact of marketing activities against the agreed aims of the marketing strategy

**Depth**

* 1. Contested concepts of marketing

Aims of school marketing strategies

Principles and processes of social marketing

Range of appropriate marketing activities in school settings

Formats for designing marketing plans

* 1. Understanding of effective pupil recruitment activities and which are most appropriate for given school.

Understanding of structure and content of strategic pupil recruitment plan.

Leading of relevant stakeholders to effectively develop a realistic and achievable pupil recruitment plan.

* 1. Evaluation of the outputs of marketing activities and how these have contributed to the achievement of strategic marketing aims.

Activities that were successful, why they were and how these could be improved.

Activities that weren’t as effective as planned, why and how these could be improved.

**Assessment guidance**

**The learner must:**

1.1 Develop a marketing **and** communication strategy, with specific aims, to deliver the school’s mission and goals. Learners **must** ensure that the strategy links to the school’s mission and goals and has clear specific aims. The format of the strategy **may** follow that agreed within the school or the learner may design their own. The period of the strategy will reflect the needs of the school context.

1.2 Lead on the development of a strategic plan for pupil recruitment to ensure sustainability of the school. The plan **must** relate directly to pupil recruitment and the agreed actions **must** show a direct link to how this will lead to sustainability of the school.

 Learners **may** work with others on the development of the plan but it **must** be clear that they have taken a leading role

1.3 Evaluate the impact of marketing activities against the agreed aims of the marketing strategy. Learners **must** choose at least two marketing activities and evaluate them against the agreed aims of the marketing strategy. Learners **must** make a judgement about how well the activities meet the agreed aims.

Suggested evidence **may** come from (but is not restricted to):

Strategy documents, written evaluation, and communication plans. Reports to governors or the senior management team. Marketing plans and marketing activity records. Pupil recruitment plans

**Learning outcome (LO 2)**

**The learner will:**

2 Be able to deliver a consistent, positive brand for the school

**Assessment criteria**

**The learner can:**

* 1. Critically evaluate how effective a school’s reputational management strategy is in promoting a positive brand for the school
	2. Ensure consistent information across all communication channels that reflects the school’s values and vision.
	3. Proactively engage with colleagues and stakeholders to embed a positive approach into the culture of the school
	4. Evaluate a school’s critical incident management strategy, making recommendations for improvements where relevant

**Depth**

* 1. Definition of ‘reputation management’

What strategy is used, is it the most appropriate, does it provide the best results for the school and support wider marketing and communications activity.

* 1. Communication channels - e.g. print, website, social

Aims of school marketing strategies

Principles and processes of social marketing

Range of appropriate marketing activities in school settings

Formats for designing marketing plans

* 1. Key concepts of ‘public relations’ and relationship management

Strategic and long-term approaches to reputation management

Defining and creating positive cultures in organisations

* 1. Definition of critical incidents in schools (e.g. see DfE – Northern Ireland)

Techniques for management of critical incidents in schools

Communication with stakeholder groups during critical incidents

Managing information and providing support after the critical incident

Reviewing the critical incident management plan

**Assessment guidance**

**The learner must:**

2.1 Critically evaluate how effective a school’s reputational management strategy is in promoting a positive brand for the school. Learners **must** define reputational management and put this in a school context. They **must** critically evaluate the strategy used in a school and make a judgement to determine effectiveness in promoting a positive brand.

 They **may** make suggestions for improvement.

2.2 Ensure consistent information across all communication channels that reflects the school’s values and vision. Learners **must** provide evidence that they have ensured a consistent approach across the communication channels used within their school context and there **must** be a clear link to how they reflect the values and vision.

 These are likely to include a range of media such as print, website and social media. They **may** reference the roles and responsibilities of key staff and stakeholders.

2.3 Proactively engage with colleagues and stakeholders to embed a positive approach into the culture of the school. Learners **must** show that they have engaged with **both** colleagues **and** stakeholders and show clearly that they have embedded a positive approach into the culture of the school.

 They **may** review different colleague and stakeholder groups and highlight different communication techniques used.

2.4 Evaluate a school’s critical incident management strategy, making recommendations for improvements where relevant. Learners **must** define what constitutes a critical incident in schools. They **must** evaluate a critical incident strategy, evaluate its effectiveness and make at least two recommendations of how the strategy can be improved.

 They **may** make reference to communication and the management of information during and after the incident.

Suggested evidence **may** come from (but is not restricted to):

School strategy documents and evaluations. Examples of work products, meeting notes, reports to governors or senior management team, communication examples.

**Learning outcome (LO 3)**

**The learner will:**

3 Be able lead on school marketing planning and activity

**Assessment criteria**

**The learner can:**

* 1. Critically assess the defined stakeholder groups to be targeted, identifying their core needs and the most effective way to communicate with each group
	2. Critically evaluate data from previous marketing activities and recommend effective future marketing activities
	3. Develop and manage a school-wide events portfolio to raise the brand awareness of the school
	4. Use persuasive arguments and convey narrative information in a succinct and accurate style in school communications and promotions

**Depth**

* 1. Situation analysis in marketing: e.g. political, legal – PESTLE.

Target consumer-groups and market segmentation.

Stakeholder analysis: categories of school stakeholder groups.

Techniques for stakeholder analysis.

Assessment of analysis of relative power and influence.

Selection of appropriate marketing channels for different stakeholders.

Evaluation of the effectiveness of different marketing channels in practice.

* 1. Data-sets and data-sources in marketing.

Monitoring systems in school marketing.

Generating/analysing stakeholder feedback on marketing activities.

Collection and analysis of data in relation to specific marketing activities.

Cost benefit analysis of marketing activity.

Assessing costs and benefits of marketing activities.

Assessing impact of marketing activities.

Using cost-benefit analysis to determine future marketing activities.

* 1. Understanding of public events as live marketing tools.

Management of an events portfolio.

Review of public events and stakeholder groups to develop balanced portfolio.

Monitor and review schedule of events to promote school trust/brand.

Identifies opportunities to enhance the events portfolio.

* 1. Key skills in creating marketing materials and media releases.

Preparation of media releases adapted to a range of different purposes and communication channels.

Structure, style and tone in marketing materials.

**Assessment guidance**

**The learner must:**

3.1 Critically assess the defined stakeholder groups to be targeted, identifying their core needs and the most effective way to communicate with each group. Learners **must** critically assess each defined group in relationship to **both** core needs **and** most effective communication. The assessment **must** be based on objective criteria or evidence and not just reflect learner opinion.

 Learners **may** carry out a stakeholder analysis to identify a range of school stakeholder groups.

3.2 Critically evaluate data from previous marketing activities and recommend effective future marketing activities. Learners **must** collect and evaluate data in relation to at least **two** previous marketing activities in schools and recommend at least **two** future marketing activities. The future recommendations **must** be clearly based on the results of the evaluation.

 This **may** be in relation to increasing pupil numbers, increasing or generating income. They **may** also include the effectiveness of stakeholder feedback on marketing activities and how the outcome of a marketing activity is monitored in schools.

3.3 Develop and manage a school-wide events portfolio to raise the brand awareness of the school. The events portfolio **may** use the format currently used in the school or learners may design their own and the timescale of the portfolio will meet the requirements of the school context. Learners **may** review current events in a school and how these engage different stakeholder groups. They **may** produce a table of events, identifying stakeholder engagement and identify opportunities to enhance the events portfolio.

3.4 Use persuasive arguments and convey narrative information in a succinct and accurate style in school communications and promotions. Learners **must** provide at least two examples from school communication and/or promotion.

Suggested evidence **may** come from (but is not restricted to):

Evaluations, examples of communications and promotions, work products e.g. event portfolio. This can be put in a format/presentation that may be presented to school stakeholders.

**Learning outcome (LO 4)**

**The learner will:**

4 Be able to lead Income generation activity in a school

**Assessment criteria**

**The learner can:**

* 1. Identify and evaluate significant income generation opportunities, including the impact they may have on enhancing or sustaining educational performance and operations
	2. Develop a business case for securing funds through a successful grant application and bid submission
	3. Manage the implementation of income-generating activity

**Depth**

* 1. Techniques for auditing a school’s current income generation activities.

Researching the range of income-generating strategies in school contexts.

Targeting new potential revenue streams for a school.

Assessment of impact of income-generating activities on a school’s performance and operations.

* 1. Concept and role of the ‘business case’.

Contents and preparation of a business case.

Research into appropriate funding sources.

* 1. Mitigating any risks associated with the income generating tasks being undertaken.

Ensuring income generation opportunity is maximised.

**Assessment guidance**

**The learner must:**

4.1 Identify and evaluate significant income generation opportunities, including the impact they may have on enhancing or sustaining educational performance and operations. Learners **must** produce an overview of types of income generation opportunities. They **must** identify at least two opportunities and evaluate how effective these can be in supporting school aims and also evaluate the impact on school performance and operations.

 Learners **may** outline the difference of income generation for revenue and capital projects.

4.2 Develop a business case for securing funds through a successful grant application and bid submission. The business case **may** follow the format dictated by the school or the bid requirements. The business case will reflect a grant application and bid that meets the needs of the school

4.3 Manage the implementation of income-generating activity. Learners **must** show all aspects of the implementation.

 They **may** include an option appraisal, show how they have mitigated risk and how they have monitored the activity. In addition they **may** include techniques to measure the level of success of the income generating activity.

Suggested evidence **may** come from (but is not restricted to):

Written evaluations, business case documentation, work products showing income generating activity, grant application and bid documentation.

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Appendix 1 Assessment guidance

This appendix provides further information on how to assess all internally-assessed units.

**Assessment planning and review**

Centres need to produce an Assessment Plan for each learner to show what evidence is required. Assessment Plans should indicate clearly which assessment criteria are being targeted.

An initial Assessment Plan must be continually reviewed and up-dated throughout the learner’s progress on the programme. This ensures effective time management and targeting of achievement. It is essential for ensuring steady progress and avoiding non-completion of the programme.

The Assessment Plan should clearly indicate the actions, resources and timescale for completion, and be agreed and completed at each meeting of the learner and their assessor. At subsequent meetings the Plan should build with feedback and review and further actions agreed.

Copies of the Plan should be held by the learner and also by the Centre - usually with the assessor. External Verifiers will require access to the Plans to verify the Centre’s compliance with the requirements in this respect.

**Quality assurance**

Centres should be aware that any assessment decision made within the centre is subject to external verification by ILM. It is important that Centres have a procedure for explaining this clearly to learners - possibly during the induction process, or in learner handbooks, etc.

Learners should be told that assessment decisions are informal, until confirmed by both internal and external verification processes. This should form part of the routine feedback to learners on assessment decisions.

Documentation should be in place to allow Internal Verifiers and External Verifiers to trace exactly how the assessment decision was reached. It is important that the assessor is able to record how the learner’s evidence demonstrates their competence so that the assessor judgement and decision is clear. Centres may like to consider the example Assessment Record Sheet provided in Appendix 4.

Centres should refer to the ILM Internal Quality Assurance Policy for full details of both Internal and External Quality Assurance guidance.

**Workplace assessment**

Learners are expected to demonstrate competence to the standards required over a period of time sufficient to demonstrate they are competent. Therefore, to ensure validity, evidence should be naturally occurring and collected through performance in the workplace.

It is acknowledged that not all employers’ workplaces are the same, therefore assessment conditions may not be identical. However, to safeguard the integrity of the qualification and ensure a robust and consistent approach to assessment the Assessor must ensure the assessment conditions reflect, as far as possible, those in which the learner is expected to work.

It is imperative the learner is not placed under more, or less, pressure than found normally in the workplace during assessment. It could be the case the learner may feel more pressure simply because he or she is being assessed.

**Simulation/Case Study**

Where naturally occurring evidence cannot be generated in the workplace in the first instance learners and Centres are advised to discuss ways of creating opportunities where this may be possible in the working environment.

Evidence may be produced through simulation/case study solely in exceptional circumstances unless it is explicitly indicated in this Handbook that simulation/case study is not allowed. The exceptional circumstances, under which simulation/case study is possible, are those situations that are not naturally or readily occurring **and** it is not possible to create suitable opportunities to generate them in the working environment. You may find it helpful to discuss this with you Quality & Compliance Manager prior to the simulation/case study activity.

Simulation/case studies must be undertaken in a ‘realistic working environment’ (RWE). A RWE is ‘an environment which replicates the key characteristics in which the skill to be assessed is normally employed’. The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.

**Holistic and integrated assessment**

A holistic approach towards the collection of evidence for this qualification is encouraged. The focus should be on assessment activities generated in the workplace, through naturally occurring evidence, rather than focusing on specific tasks. Taken as a whole, the evidence must show the learner meets all learning outcomes and assessment criteria consistently, over a period of time. It should be clear where each learning outcome/assessment criteria has been covered and achieved.

Holistic assessment could be achieved through the use of integrated assessments. Units do not have to be assessed one-by-one; they can be assessed in combination. When a single assessment instrument, e.g. a project or presentation, is used for two or more units, this is called ‘integration’.

A rationale for integrating assessments is needed, for example, either sequencing (i.e. one unit naturally follows and builds on another) or content overlap (i.e. there are common areas between units, eg communication). The same integration principles can be applied to individual learning outcomes from different units.

All the assessment criteria from the units being integrated need to be included in the assessment exactly as worded in the unit. However, to save the learner from having to do much of the same thing repeatedly, one piece of work by the learner may well simultaneously satisfy two or more similar criteria.

Further guidance on integrating assessments could be found in the ILM Guidelines for integrating assessment for two or more ILM units.

**Judging sufficiency**

Judging the sufficiency of a learner’s piece of work is often a key aspect in assessment. The test of whether the evidence is of sufficient quantity and quality is very much informed by the qualification level and, in particular, by the verb used in the relevant assessment criterion. The higher levels expect a fuller learner response with greater breadth and depth.

Some sufficiency indicators are provided in the unit assessment guidance for the units. In addition to these, assessors, tutors and learners must examine the verb used in the assessment criterion. At Level 4, lower level of demand assessment verbs such as ‘identify’, ‘describe’ and ‘explain’ are commonly used in criteria. At Level 5, more demanding assessment verbs like ‘assess’ and ‘analyse’ are used. Definitions of key assessment verbs can be found on the ILM Assessment Verb Glossary.

Evidence presented by the learner can be claimed against more than one assessment criterion as long as it meets the criterion requirements. For example, evidence from a work project undertaken by the learner could provide sufficient evidence to meet the requirements of a number of assessment criteria from a number of different units.

Documentation should be in place to allow Internal and External Verifiers to trace exactly how the assessment decision was reached.

**Grounds for referral**

Although there can be grounds for being unable to review a portfolio of evidence, learners cannot be referred purely because of poor literacy, presentation or missing a deadline. The reason must relate to the requirements of the assessment as articulated by the assessment criteria.

**Authenticity**

It is a regulatory requirement that every learner must formally declare the authenticity of their work for each submission for assessment. Declarations must be in an auditable form. ILM External Verifiers cannot ratify any assessments where the learner has not specifically confirmed it is their own work.

ILM provides a Submission Cover Sheet that Centres are recommended to use for this purpose, which could be found in the *ILM Plagiarism, Collusion and Cheating Policy*. If a Centre opts not to use the cover sheet, it is essential that some mechanism is used to require learners to specifically confirm the authenticity of each assessment.

**Communication of assessment decisions**

Centres should be aware that any assessment decision made within the Centre is subject to ratification by ILM. It is important that Centres have a procedure for explaining this clearly to learners - possibly during the induction process, or in learner handbooks. Learners should be told that assessment decisions are informal, until confirmed by internal and external verification and the awarding body. This should form part of the routine feedback to learners on assessment decisions.

**Language of assessment**

Assessment of all units for this qualification will be available in English. All learner work must be in English.

**Access Arrangements**

Assessments need to be administered fairly to all learners.

Access arrangements allow candidates to show what they know and can do without changing the demands of the assessment. For example, through the use of readers, scribes and Braille question papers. Access arrangements are agreed before an assessment. They allow candidates with special educational needs, disabilities or temporary injuries to access the assessment.

Further information on how to apply for access arrangements can be found in the *ILM Access Arrangements and Special Considerations* policy.

**Special considerations**

A Special Consideration is a post-assessment adjustment reflecting an unforeseen circumstance which could affect a learner’s performance during or near the time of an assessment. Further information on how to apply for special considerations can be found in the *ILM Access* *Arrangements and Special Considerations* policy.

Appendix 2 Conducting professional discussions

**Purpose**

A professional discussion is a planned, in-depth, two-way conversation between an assessor and a learner and provides a holistic approach to assessing performance, knowledge and understanding. It can be used to probe the level of competence of the learner so the assessor is certain that their actions are based on a firm understanding of principles which support practice. It can be used to test the validity and reliability of a learner’s evidence and confirm authenticity where this is questionable. It can help a learner who finds written evidence difficult to produce or used to address any gaps in the learner’s product evidence. It enables the assessor to make a judgement of competence against agreed standards.

**Planning the discussion**

Learners and assessors should plan for a professional discussion. It should be a structured process where a time and date are agreed in advance. Appropriate time must be allowed for the discussion to take place and the specific areas of activity to be explored. The methods by which the discussion will be conducted must be clearly identified and agreed in advance.

The assessor needs to be clear about the required outcomes and should agree with their learner a list of areas/points they wish them to cover. It is recommended that learners receive a written copy of these points in advance of the discussion. Assessors should ensure that learners have a good understanding of the relevant standards and the assessment process.

**Facilitating the discussion**

The assessor must be skilled in putting the learner at ease and should be experienced in the interviewing process in order to make their learners feel comfortable about the process. Therefore, the assessor’s interpersonal skills are key in achieving positive results. The assessor’s role is to manage the process in order to allow their candidate to prove their knowledge and understanding in a supported environment but without the assessor constantly directing and leading the conversation.

As the beginning of the discussion, the assessor is likely to be doing most of the talking (i.e. recapping the reason for the discussion and agreeing how the main points of the discussion will be assessed and recorded). However as the discussion progresses, the learner should be doing most of the talking with the Assessor ensuring the discussion remains focused and effective. They may periodically summarise points covered, question to probe for more information or clarify certain points of the discussion whilst using language the learner understands. The discussion needs to be time managed by the assessor.

**Recording the discussion**

When using this assessment method, the discussion becomes the evidence and it is how the discussion is managed, recorded and referenced that will make it valid, relevant and reliable. The discussion may take place face-to-face or remotely and arrangements for this should be agreed in advance.

A professional discussion is a planned event which is recorded. The recording can use a variety of techniques including written notes, verbal recording, video, Skype, recording on Smart phones and online Instant Messaging. The discussion must be saved and included as part of the learner evidence with the assessment criteria annotated as to where they have been addressed.

A record of the discussion should be produced to show how the points relate to the standards/evidence requirements. Whatever recording method is selected, the assessor needs to ensure that the evidence resulting from the discussion is clearly referenced to the appropriate standards/evidence requirements. This is important to enable effective verification and is a way of formalising the process.

If handwritten notes are taken by the assessor it is good practice for the learner to authenticate them and confirm them as a true record of the conversation. If audio is used, it is important that the learning outcomes/assessment criteria are mapped to the recording – ideally with the time when the criteria was addressed via the discussion. For example, 1m 55 secs AC 3.1, 2m 43 secs AC 5.4 and 5.5.

The learner’s evidence and the assessor’s decision about the evidence must be available to all those involved with quality assurance. There is not a need to transcribe recordings but annotated time counters will allow the Quality Assurance team to pinpoint material more easily during the verification process.

**Common mistakes when conducting a professional discussion**

* Lack of preparation.
* No clear link between the discussion and relevant standards.
* Lack of prior agreement between assessor and learner about the format/content.
* No specified time or dedicated space for the discussion.
* Not referencing the discussion correctly.
* Use of group discussion instead of required individual discussion.
* Ineffective questioning and discussion techniques, such as:
* Asking too many questions at once.
* Asking a question and then the assessor answering it themselves.
* Always asking the same kind of question.
* Not giving the learner time to think and answer.
* Asking difficult questions too early in the conversation.
* Leading the learner.

Appendix 3 Assessment plan template

This record is for ongoing use throughout the assessment process. It is intended for the learner and assessor to detail agreed planning for assessment of skills and combined units.

|  |  |  |  |
| --- | --- | --- | --- |
| **Qualification:** |  | **Learner Name:** |  |
| **Unit:**  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Date***Date the action is agreed* | **Action***The activity to be carried out, resources needed, type of evidence or assessment, and links to units* | **By When***Date by which action is to be completed* | **Feedback and Review***Feedback on the outcome of the action and consideration of what is next. Leads to new action agreed in next row* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

The actions, feedback and review outlined above have been agreed between the assessor and learner.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature of learner: |  |  Date: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature of assessor: |  |  Date: |  |

Appendix 4 Assessment record sheet

|  |  |  |  |
| --- | --- | --- | --- |
| **Qualification:** |  | **Learner Name:** |  |
| **Unit:**  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Evidence****reference****or location** | **Evidence title** | **Links to other units** | **Assessment Criteria** |
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I confirm that the evidence provided is a result of my own work.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature of learner: |  |  Date: |  |

I confirm that the learner has demonstrated competence by satisfying all of the assessment criteria for this unit.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature of assessor: |  |  Date: |  |

Appendix 5 Sources of general information

The following documents contain essential information for Centres delivering ILM qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the ILM Website [www.i-l-m.com](http://www.i-l-m.com).

ILM Customer Handbook contains all of the essential information you need to work with ILM, including your contract and our policies. Specifically, the document includes sections on:

* Section A: Introducing ILM
* Section B: How to become an ILM Approved Centre and Recognised Provider
* Section C: Your contract with ILM
* Section D: Policies and Guidance

*Linking to this document from web pages*

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

Useful contacts

|  |  |
| --- | --- |
| ILM Customer Services General enquiriesEvents enquiriesInternational enquiries | E: customer@i-l-m.com |
| Complaints and feedbackComplaints and feedback | E: customer@i-l-m.com |
| ILM Regulation and complianceReporting malpractice/maladministrationReporting incidents of plagiarismLodging appeals | E: ILMregulation@i-l-m.com |
|  |  |

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