Qualification specification

NCFE Level 3 Diploma for Business Administrators
QN: 603/5359/4

Contents

Section 1
About this qualification

Summary of changes

This document summarises the changes to this qualification specification since the last version (Version 1.0 February 2020). Please check the NCFE website for the most recent version.

Version	Publication date	Summary of amendments
v1.0	February 2020	First publication
v1.1	June 2022	Further information added to the achieving this qualification section to confirm that unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English. Information added to the entry guidance section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal. Information added to the support handbook section about how to access support handbooks.
v1.2	July 2023	Information regarding UCAS added to About this qualification, Qualification Summary.

Introduction

This Qualification Specification contains details of all the units and assessments required to complete this qualification.

To ensure that you are using the most up-to-date version of this Qualification Specification, please check the version number and date in the page footer against that of the Qualification Specification on the NCFE website.

If you advertise this qualification using a different or shortened name, you must ensure that learners are aware that their final certificate will state the full regulated qualification title.

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- the resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

Support Handbook

This qualification specification must be used alongside the mandatory support handbook which can be found on the NCFE website. This contains additional supporting information to help with planning, delivery and assessment.

This qualification specification contains all the qualification-specific information you will need that is not covered in the support handbook.

Qualification summary	
Qualification title	NCFE Level 3 Diploma for Business Administrators
Qualification number (QN)	603/5359/4
Aim reference	60353594
Total Qualification Time (TQT)	405
Guided Learning Hours (GLH)	240
UCAS	This qualification has been allocated UCAS points. Please refer to the UCAS website for further details of the points allocation and the most up-to-date information.
Minimum age	16
Qualification purpose	The purpose of this qualification is to provide learners with the knowledge, skills and understanding to work as a Business Administrator within any sector or industry. The qualification will support learners completing the Business Administrator Apprenticeship Standard. The qualification can also be used as a stand-alone qualification for those learners wishing to gain a qualification in business administration.
Aims and objectives	This qualification aims to: • focus on the study of business administration within any sector or industry • provide further knowledge for those working in business administration. The objectives of this qualification are to enable learners to: • plan and organise work, review processes and make suggestions for improvements to working practices • understand own organisation and the legal framework in which it operates • communicate effectively in a business environment • resolve business problems using effective decision making • demonstrate IT skills for business • scope, plan, manage and evaluate a project • manage own personal and professional development.

Real work environment (RWE) requirement/ recommendation	Where the assessment requirements for a unit allow, it is essential that organisations wishing to operate a RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This is often used to support simulation.
Rules of combination	To be awarded the Level 3 Diploma for Business Administrators, learners are required to successfully complete 7 mandatory units.
Assessment method	Internally assessed and externally quality assured portfolio of evidence.
Apprenticeship frameworks/standards	This qualification will support learners completing the Business Administrator Apprenticeship Standard.
Progression	Learners who achieve this qualification could progress to: • Level 3 Diploma in Management Skills and Knowledge • Level 4 Certificate in Leadership and Management • Level 5 Diploma in Management Skills and Knowledge • employment in administration and management roles.
Regulation information	This is a regulated qualification. The regulated number for this qualification is 603/5359/4.
Funding	This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

Entry guidance

This qualification is designed for learners who are working, or would like to work, in a business administration role within any sector or industry. It is ideal for those who are new to the role or who have been working at this level for a short period of time.

Registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.

Entry is at the discretion of the centre. However, learners should be aged 16 or above to undertake this qualification.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the learning outcomes and comply with the relevant literacy, numeracy and health and safety aspects of this qualification.

Learners registered on this qualification should not undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

Achieving this qualification

To be awarded this qualification, learners are required to successfully achieve 7 mandatory units**.**

Please refer to the list of units below or the unit summaries in Section 2 for further information.

To achieve this qualification, learners must successfully demonstrate their achievement of all learning outcomes of the units as detailed in this Qualification Specification. A partial certificate may be requested for learners who do not achieve their full qualification but have achieved at least one whole unit.

Unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

Mapping to the Business Administrator Apprenticeship Standard

A mapping document is available on the Qualifications page on the NCFE website showing which units and assessment criteria of the Level 3 Diploma for Business Administrators map to the Business Administrator Apprenticeship Standard.

Behaviours mapping

The behaviours requirements within the Business Administrator Apprenticeship Standard are not assessed as part of this qualification; however, learners may have the opportunity to develop and evidence the behaviours throughout the units.

Units

To make cross-referencing assessment and quality assurance easier, we have used a sequential numbering system in this document for each unit.

The regulated unit number is indicated in brackets for each unit (eg M/100/7116) within Section 2.

☆ Knowledge only units are indicated by a star. If a unit is not marked with a star, it is a skills unit or contains a mix of knowledge and skills.

Mandatory units

Unit number	Regulated unit number	Unit title	Level	GLH
Unit 01	K/617/8997	Organisational planning and processes	3	40
Unit 02	M/617/8998	Legislation, structure and finance in a business environment	3	45
Unit 03	T/617/8999	Communication in a business environment	3	20
Unit 04	Y/617/9000	Decision making and problem solving in a business environment	3	20
Unit 05	D/617/9001	IT skills for business	3	45
Unit 06	H/617/9002	Project management skills for business	3	40

Unit 07	K/617/9003	Development of self and others	3	30

The units above may be available as stand-alone unit programmes. Please visit our website for further information.

Progression to higher level studies

This qualification aims to provide learners with a number of progression options, including higher level studies at university or FE colleges. The skills required to progress to higher academic studies are different from those required at Levels 1 and 2. Level 3 qualifications enable the development of these skills. Although there is no single definition of higher level learning skills, they include:

- checking and testing information
- supporting points with evidence
- self-directed study
- self-motivation
- thinking independently
- analysing and synthesising information/materials
- critical thinking and problem solving
- working collaboratively
- reflecting upon learning and identifying improvements.

Level 3 criteria can require learners to **analyse**, **draw conclusions**, **interpret** or **justify**, which are all examples of higher level skills. This means that evidence provided for the portfolio will also demonstrate the development and use of higher level learning skills.

If you need any further information, please refer to the NCFE website.

How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

This qualification is internally assessed and externally quality assured.

The assessment consists of one component:

- an internally assessed portfolio of evidence which is assessed by centre staff and externally quality assured by NCFE.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply.

All the evidence generated by the learner will be assessed against the standards expected of a Level 3 learner for each learning outcome.

Internal assessment

Each learner must create a portfolio of evidence generated from appropriate assessment tasks, which demonstrates achievement of all the learning outcomes associated with each unit. On completion of each unit, learners must declare that the work produced is their own and the Assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in Section 2.

Internally assessed work should be completed by the learner in accordance with the Qualification Specification.

The Tutor must be satisfied that the work produced is the learner's own.

A centre may choose to create their own internal assessment tasks. They should:

- be accessible and lead to objective assessment judgements
- permit and encourage authentic activities where the learner's own work can be clearly judged
- refer to Course File Documents on the NCFE website.

Supervision of learners and your role as an Assessor

Guidance on how to administer the internal assessment and the support you provide to learners can be found on the NCFE website.

Feedback to learners

Guidance on providing feedback during teaching and learning and each stage of the assessment can be found on the NCFE website.

Section 2

Unit content and assessment guidance

Unit content and assessment guidance

This section provides details of the structure and content of this qualification.

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes are covered and if the evidence generated can be internally and externally quality assured. For approval of methods of internal assessment other than portfolio building, please contact our Quality Assurance team.

The Explanation of terms explains how the terms used in the unit content are applied to this qualification. This document can be found in Section 3.

For further information or guidance about this qualification, please contact our Customer Support team.

Unit 01 Organisational planning and processes (K/617/8997)

Unit summary	In this unit, learners will be able to plan and organise work, review processes and make suggestions for improvements to working practice. Learners will also be able to manage equipment or facilities within an office environment, prepare and organise meetings and events, and take responsibility for logistics.
Guided learning hours	40
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1   Be able to plan and organise work and review processes within the organisation

The learner can:

1.1   Take responsibility for initiating and completing tasks
1.2   Demonstrate how to manage priorities and time in order to successfully meet deadlines
1.3   Manage the expectations of colleagues at all levels
1.4   Review processes autonomously and make suggestions for improvements to working practice
1.5   Apply a solutions-based approach to improve **business processes** and help define procedures

Key word(s)

Business processes: could include making payments or processing customer data

Assessment guidance

Delivery and assessment
1.1–1.2 The learner should evidence that they can initiate, manage, prioritise and complete a range of tasks in order to meet deadlines.
1.3 The learner should demonstrate that they can appropriately communicate and negotiate with their team and managers so that expectations are met.
1.4–1.5 The learner must show that they understand the organisation's processes and can make viable suggestions for improvements, looking at solutions rather than problems. They should show an understanding of implications beyond their immediate environment (eg impact on clients, suppliers and other parts of the organisation). They must demonstrate that they can contribute to new or revised procedures.
This learning outcome supports:
• skills: planning and organisation, quality, record and document production • knowledge: processes.
The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • observation • reflective account • witness statement • peer feedback • products • report • discussion.

Learning outcome 2

The learner will:

2   Be able to manage resources within an office environment

The learner can:

2.1   Manage the maintenance of office **resources** to meet users' needs and expectations
2.2   Manage effective relationships with suppliers
2.3   Provide administrative services to agreed standards in line with organisational procedures

Key word(s)

Resources: could include equipment and facilities

Assessment guidance

Delivery and assessment
2.1 The learner should show that maintenance of equipment and/or facilities has met the needs and expectations of the users. They could identify user needs from feedback, requests or complaints. 2.2 The learner should identify the suppliers in question and be able to demonstrate an effective, ongoing communication with them which could be either verbal or written. 2.3 The administrative services provided could be document production, use of email software, spreadsheet production or reporting, database management or reporting, financial record keeping, or performance of financial processes. This learning outcome supports: • skills: planning and organisation, record and document production, communications • knowledge: processes, stakeholders. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • observation • reflective account • witness statement • feedback from suppliers • peer feedback • products • report • discussion.

Learning outcome 3

The learner will:

3   Be able to prepare and organise meetings

The learner can:

3.1   Book meeting venues, resources and facilities in accordance with the brief
3.2   Collate documents needed for a meeting
3.3   Distribute meeting invitations, documents and other meeting related requirements within the timescale
3.4   Confirm meeting attendees and any special requirements
3.5   Provide support to meetings in accordance with requests, including taking minutes
3.6   Distribute meeting records promptly to the agreed distribution list, including action logs as appropriate
3.7   Carry out any follow-up actions in accordance with the brief

Assessment guidance

Delivery and assessment
3.1 The learner should carry out a risk assessment of a venue to ensure the health, safety and welfare of attendees. 3.2 The learner should show that they can gather the appropriate documentation for a meeting from a variety of sources and organise them into an appropriate order, labelling them appropriately. This should include the meeting agenda. 3.3–3.4 Invitations should be sent in a format appropriate to the meeting and the attendees. This could be via email or electronic calendar invite. They should demonstrate the ability to identify any special requirements (eg access, dietary, parking) and collate responses of attendance and requirements, passing the information to appropriate personnel. They should ensure that all meeting documentation is sent to attendees in a timely manner. 3.5–3.7 The learner should take minutes of the meeting in accordance with organisational procedures, ensuring that actions are noted for both themselves and others. They should distribute

the minutes accordingly to both attendees and those who sent apologies, and carry out follow-up actions as appropriate.

This learning outcome supports:

- skills: planning and organisation, record and document production, communications
- knowledge: processes.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - observation - products – agenda and minutes of the meeting - reflective account - witness statement - peer feedback - report - discussion.

Learning outcome 4

The learner will:

4   Be able to prepare and organise events

The learner can:

4.1   Consider venue requirements for an event
4.2   Distribute pre-event documentation to delegates in accordance with the event plan
4.3   Coordinate attendee responses within the agreed timescale
4.4   Consider any special requirements of event attendees
4.5   Manage layout and resources in accordance with the event plan
4.6   Carry out follow-up actions in accordance with the event plan and agreements made at the event

Assessment guidance

Delivery and assessment
4.1, 4.5 The learner should carry out a risk assessment of a venue to ensure the health, safety and welfare of delegates. They should demonstrate that they have considered the type of event, resources and facilities needed, and the likely number of delegates. They should then manage the setting up of the event itself. 4.2–4.4 The learner should collate and distribute pre-event documentation to delegates via an appropriate channel in an appropriate format, collating responses and any special requirements (eg

access, dietary, parking). They should show how they have considered requests for special requirements.

4.6 The learner should carry out any actions following the event in accordance with the event plan and agreements made at the event.

This learning outcome supports:

- skills: record and document production, planning and organisation, communications
- knowledge: processes.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - products - observation - reflective account - witness statement - report - discussion.

Learning outcome 5

The learner will:

5   Be able to organise **logistics**

The learner can:

5.1   Consider different suppliers that are capable of delivering the services required within budget
5.2   Confirm the requirements for **logistics**
5.3   Prepare and issue documentation that reflects agreed arrangements accurately
5.4   Keep up-to-date records of logistics arrangements and agreed commitments

Key word(s)

Logistics: could include travel and accommodation, transportation of goods and/or information, warehousing, packaging, etc

Assessment guidance

Delivery and assessment
5.1 The learner must show that they have researched the services required and compared the costs from different suppliers. 5.2 The learner must take responsibility for logistics, confirm requirements and take action appropriately. 5.3–5.4 The learner must show that they have kept appropriate records of the arrangements, in accordance with organisational procedures. This should include managing bookings and payments through appropriate personnel. This learning outcome supports: • skills: planning and organisation, record and document production, communications • knowledge: processes, stakeholders. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • products • observation • reflective account • witness statement • report • discussion.

Unit 02 Legislation, structure and finance in a business environment (M/617/8998)

Unit summary	This unit will provide learners with an understanding of their own organisation and the financial and legal framework in which it operates.
Guided learning hours	45
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1   Understand organisational purpose and structure

The learner can:

1.1   Describe their organisation's vision, values and purpose
1.2   Explain how their role contributes to the achievement of an organisation's vision, mission and objectives
1.3   Explain how the organisation's goals may be shaped by the **political and economic environment** in which it operates
1.4   Analyse **external factors** that may have an impact on an organisation's performance using an **appropriate tool**
1.5   Describe types of **organisational structures**

Key word(s)

Political and economic environment: nationally and internationally
External factors: eg market forces, policy and regulatory changes, supply chain (this is not an exhaustive list)
Appropriate tool: eg PESTEL analysis
Organisational structures: could include hierarchical, matrix, horizontal/flat

Assessment guidance

Delivery and assessment
1.1 If the organisation does not have its vision and values in written form, the learner may describe this from the perspective of the workers. 1.2 The learner should explain how different aspects of their role contribute to different objectives. A full description in 1.1 will help the learner to identify in which ways their role contributes. 1.3–1.4 It is likely that PESTEL analysis will be chosen as a tool to analyse external factors, as this is accepted as the most commonly used. This will require the learners to analyse the Political, Economic, Social, Technological, Environmental and Legal factors that may affect their organisation. Other tools can be used. The analysis should include Internet and other research to support the facts. It could be combined with performing a SWOT analysis. The learner should consider the activities and resources specific to their own organisation. Completing 1.3 and 1.4 should clarify the impact this could have on 1.1.

1.5 The learner should describe the most common organisational structures and be able to identify the structure of their own organisation. Case studies and diagrammatic representations could be used to aid demonstration of understanding.
This learning outcome supports:

- knowledge: the organisation and value of their skills, external environmental factors.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - written report - analysis of case studies - annotated products - oral and written questioning.

Learning outcome 2

The learner will:

2   Understand law, regulations and policies that apply to their organisation and role

The learner can:

2.1   Describe the legal obligations of different **types** of businesses
2.2   Describe how the organisation's key internal policies support their legal obligations
2.3   Explain the legal obligations of the employer for health and safety in the workplace
2.4   Explain legislation relevant to their role
2.5   Explain the impact of equality, diversity and inclusion across aspects of organisational policy
2.6   Explain the requirements of data protection, copyright and intellectual property legislation relating to document production
2.7   Describe how they ensure compliance to the policies and procedures of the organisation within their role
2.8   Describe the steps that can be taken to ensure the protection of data when sending emails and attachments

Key word(s)

Types: could include sole trader, limited company, partnership

Assessment guidance

Delivery and assessment
2.1 As a minimum, the learner should give an overview of the requirements of HMRC, Companies House, data protection, health and safety, equality and diversity, employment law and consumer rights for at least three different business types. This could be produced in the form of a table with a following description.

2.2 The learner should map how their own organisation's policies relate to the legal obligations and explain how. They should include any key policies relating to their own sector.

2.3 This could include explanations for conducting risk assessments, providing information and opportunities for consultation and training, and abiding by regulations.
2.4 As a minimum, the learner should include:

- data protection
- health and safety
- compliance
- equality and diversity (and also sector specific legislation where appropriate).

2.5 The learner should explain how their organisation has incorporated equality, diversity and inclusion into the way they conduct their business and could include examples of any particular impact.

2.6 The learner should provide an explanation for each.

2.7 The learner should identify the specific policies and procedures with which they comply and describe what they do within their roles that demonstrates compliance to each of those identified.

2.8 This could include the use of password protection, secure data transfer, redacting, encryption, secure servers and checking email addresses.

This learning outcome supports:

- skills: record and document production
- knowledge: relevant regulation and policies.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - written report - oral and written questioning - professional discussion - annotated products - reflective accounts.

Learning outcome 3

The learner will:

3   Understand the principles of managing change

The learner can:

3.1   Explain the need for change and the consequences of not implementing change

3.2   Explain the importance of effective leadership when implementing change
3.3   Describe the use of **change management models**
3.4   Explain the different types of barriers to change and how to deal with these
3.5   Explain how to evaluate change management projects

Key word(s)

Change management models: could include (but not limited to) McKinsey 7S framework, Kotter's 8-step change model, Lewin Freeze Theory, Kubler Ross Change Curve

Assessment guidance

Delivery and assessment
3.1 The need for change could include business growth/recession, internal/external factors, technological advances and consumer habits. The consequences of not implementing change could include financial implications, competition, employee morale, quality assurance, productivity and missed opportunities. The learner should also consider unknown outcomes of change that may result in beneficial or adverse effects. 3.2 The learner should look at aspects of effective leadership (eg vision, planning, communication and managing resources) and explain the importance of these. 3.3 The learner must be able to describe at least two models and how they can be applied to change. 3.4 Different barriers to change: these may include physical/emotional, resources/finance and staffing/skills. 3.5 The learner will explain what can be done to establish whether a change was successful and whether it met the aims and objectives of the planned change. This learning outcome supports: • knowledge: business fundamentals. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • written report • professional discussion • oral and written questioning.

Learning outcome 4

The learner will:

4   Understand the principles of business finance

The learner can:

4.1   Explain the importance of financial viability for an organisation
4.2   Explain the consequences of poor financial management
4.3   Describe organisational hierarchy and levels of authority for financial transactions

Assessment guidance

Delivery and assessment
4.1 The learner should consider a variety of influences such as operating costs, wages and salaries, overheads, assets, growth, cashflow and debtors/creditors. 4.2 The learner should explain the wide-reaching effect of poor financial management which could include any of the aspects in 4.1, plus possible legal implications. 4.3 The learner should look at the different types of financial transactions that occur within their own organisation and describe the limitations and authority of different roles. This could include wages and salaries, creditors/debtors, administration of billing, processing of invoices and purchase orders, subsistence and travel, assets and resources. This learning outcome supports: • knowledge: business fundamentals, processes, value of their skills. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • written report • professional discussion • oral and written questioning.

Unit 03 Communication in a business environment (T/617/8999)

Unit summary	This unit is about the ability to communicate effectively in a variety of forms and with a range of audiences, including internal/external colleagues and stakeholders.
Guided learning hours	20
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1   Be able to manage stakeholder relationships

The learner can:

1.1   Identify the **stakeholders** for the organisation
1.2   Describe the stakeholders' relationship with the organisation
1.3   Liaise with internal and external stakeholders
1.4   Develop and foster relationships with internal and external stakeholders
1.5   Respond to queries from internal and external stakeholders

Key word(s)

Stakeholders: eg internal/external customers, clients and/or suppliers, inside or outside the UK

Assessment guidance

Delivery and assessment
1.1 Stakeholders should include those who will be impacted by a business's decisions. The learner could use stakeholder mapping techniques to identify stakeholders. 1.2 Having identified the stakeholders, the learner must be able to describe the interests of each, how they engage with the organisation and the influence they have. 1.3 The learner must demonstrate how they liaise with stakeholders. This could be stakeholders from inside or outside the UK and could be liaison in a variety of forms. 1.4 The learner must show how they have responded to the communication needs of stakeholders and kept them informed over time, demonstrating a good working relationship. 1.5 The learner must show how they are active in responding to queries. This learning outcome supports: • skills: communication • knowledge: stakeholders. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • written report • oral or written questioning • products • witness statement • observations • peer feedback.

Learning outcome 2

The learner will:

2   Be able to communicate effectively

The learner can:

2.1   Select communication methods which are appropriate to the **audience** and information to be communicated
2.2   Communicate effectively through:
         • face-to-face interaction
         • telephone
         • writing
         • **digital platforms**.
2.3   Adapt the style and content of communication appropriate to specific **audiences**
2.4   Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards
2.5   Evaluate different tools and channels of social media for business use
2.6   Develop a plan for a social media campaign for the organisation

Key word(s)

Audience(s): internal, external, formal, informal
Digital platforms: eg email, social media, web pages

Assessment guidance

Delivery and assessment
2.1–2.2 These require that the learner chooses the most appropriate communication channel for the task. The communication must be clear and should achieve its purpose in order to be effective. 2.3–2.4 The learner must demonstrate that they can adapt communication according to the audience, both in style and content. They should demonstrate agility and confidence in communications, carrying authority appropriately and ensuring that they follow the organisation's protocols.

2.5 The learner needs to show that they understand the pros and cons of different tools and channels so that they can apply their understanding appropriately when producing a social media campaign in 2.6.

2.6 The social media campaign should include SMART (specific, measurable, achievable, realistic and time-bound) targets and an accompanying rationale. Should the learner's own organisation not be appropriate for such a campaign, the learner may identify another suitable organisation.

This learning outcome supports:

- skills: communication, record and document production, IT
- knowledge: policies.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence

Evidence could include:

- written evaluation
- observations
- oral or written questioning
- products
- witness statement
- written report
- peer feedback
- video.

Unit 04 Decision making and problem solving in a business environment (Y/617/9000)

Unit summary	In this unit, the learner will demonstrate proactivity and good judgement in making decisions and applying problem solving skills to challenging issues.
Guided learning hours	20
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1   Know how to make effective decisions

The learner can:

1.1   Explain the importance of defining the objectives, scope and success criteria of the decisions to be taken
1.2   Evaluate the potential impact of various options in making the decision
1.3   Demonstrate the ability to make effective decisions based on **sound reasoning**
1.4   Consider the views of others when making the decision
1.5   Seek advice from others for areas outside of one's own expertise
1.6   Explain the importance of aligning decisions with business objectives, values and policies
1.7   Communicate the outcome of a decision in an appropriate way
1.8   Manage challenging situations in a professional way

Key word(s)

Sound reasoning: considering options thoroughly in a logical manner, providing a rationale

Assessment guidance

Delivery and assessment
1.1 The learner needs to know how to plan an approach to making a decision.
1.2 The learner will need to look at a variety of possible outcomes for at least two significant decisions.
They will need to evaluate each of the possible outcomes stating the impact, both positive and negative, that each outcome might bring.
1.3 The learner will make at least two significant decisions directly linked to 1.2 in order to demonstrate that sound reasoning has been applied.
1.4–1.5 These could be met within 1.3 or could be evidenced separately. It must be clear whose views are being taken into consideration and what additional expertise is being sought.
1.6 The learner must explain why decisions should consider business objectives, values and policies.
1.7 The learner must show that they have chosen an appropriate channel through which to communicate the decision and have communicated the outcome carrying authority appropriately.

1.8 The learner must demonstrate how they have managed at least two challenging situations.

This learning outcome supports:

- skills: decision making, interpersonal skills and communications.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - written report - oral or written questioning - reflective account - observation - witness statement - peer feedback.

Learning outcome 2

The learner will:

2   Be able to resolve business problems

The learner can:

2.1   Identify the nature, likely cause and implications of problems
2.2   Take the lead as a point of contact for addressing issues
2.3   Resolve business problems showing proactivity and good judgement
2.4   Resolve a complex or challenging complaint in an effective and timely manner
2.5   Consider the views of others when solving a problem

Assessment guidance

Delivery and assessment
2.1 The learner must identify at least two problems. 2.2 The learner could take the lead as a point of contact in relation to a particular problem or could be the point of contact for addressing other identified issues within the organisation. 2.3 The learner must evidence that they have resolved at least two business problems. This could incorporate 2.4 but they must be clear on the judgements that they themselves made. They could also consider appropriate IT solutions to suit the business problem. 2.4 The learner should be able to demonstrate their problem solving skills in resolving the complaint. A complex complaint may involve several different departments or external organisations. A challenging complaint may be one that has significant resource or financial implications.

2.5 The learner must evidence that they have considered the views of others when solving a problem. 'Others' could include more experienced team members or those that the problem affects.

This learning outcome supports:

- skills: quality and interpersonal skills, decision making.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: - observation - witness statement - reflective account - written report - peer feedback - products - oral or written questioning.

Unit 05 IT skills for business (D/617/9001)

Unit summary	This unit requires the learner to demonstrate skill in the use of multiple IT software and systems relevant to the organisation.
Guided learning hours	45
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1 Be able to use IT software to create, format and present documents

The learner can:

1.1 Select and edit information to accurately produce a variety of **documents**
1.2 Select and use a range of editing tools to format document content
1.3 Select and use appropriate tools and techniques to organise and structure **long documents**
1.4 Create, use and modify columns, tables and forms to organise information
1.5 Create, use and modify appropriate templates for different types of documents
1.6 Check documents for accuracy, using IT tools and making corrections as necessary

Key word(s)

IT software: eg PowerPoint, Prezi, Word, Outlook, Publisher
Documents: letters, emails, reports, proposals, minutes, brochures
Long documents: these should be of sufficient length to demonstrate use of a variety of tools and techniques

Assessment guidance

Delivery and assessment
Documents may be produced to meet the requirements of other units.
1.1 The learner should select and edit information to accurately produce a variety of documents.
1.2 The learner could include bold, italic, underline, font changes, text effects, paragraphing, bullet points, borders and shading.
1.3 The learner could include use of heading styles, headers and footers, page numbering, section breaks, bookmarks, formatting marks, contents page, etc.
1.4 The learner should use IT software to create, use and modify columns, tables and forms to organise information.
1.5 The learner should create, use and modify appropriate templates for different types of documents.
1.6 The learner should check documents for accuracy using IT tools and make corrections as necessary.

This learning outcome supports:

• skills: IT, record and document production.
The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence must include: • products – documents. Evidence could include: • observation • reflective account • witness statement • report.

Learning outcome 2

The learner will:

2   Be able to use email software effectively

The learner can:

2.1   Select and use software tools to compose, format and send email messages, including attachments
2.2   Organise, store and archive email messages effectively
2.3   Send email messages to individuals and groups
2.4   Use an address book to manage contact information
2.5   Use email software **tools and techniques** to automate responses
2.6   Use email software to manage meetings and calendars

Key word(s)

Tools and techniques: could include setting of rules and alerts, composing the message, internal/external responses, use of templates

Assessment guidance

Delivery and assessment
Evidence may be generated to meet the requirements of other units. 2.1, 2.3 The learner should select and use software tools to compose, format and send email messages (including attachments) to individuals and groups. 2.2 The learner should follow the organisation's policy to organise, store and archive email messages.

2.4 The learner should use email software to create an address book to manage contact information.

2.5 The learner could use email software to automate responses by setting rules and alerts, using templates and creating internal/external responses.
2.6 The learner should use email software to create and manage meetings and calendars.

This learning outcome supports:

* skills: IT, record and document production.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence must include: • products. Evidence could include: • observation • reflective account • witness statement • report.

Learning outcome 3

The learner will:

3   Be able to use a spreadsheet to enter, edit and organise numerical and other data

The learner can:

3.1   Identify what **data** is required in the spreadsheet and how it should be structured
3.2   Enter and edit data accurately
3.3   Select and use a wide range of appropriate functions and formulas to meet calculation requirements
3.4   Combine and link data from different sources
3.5   Select and use a range of **tools and techniques** to analyse and interpret data to meet requirements
3.6   Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
3.7   Select and use appropriate tools and techniques to generate, develop and format charts and graphs
3.8   Correct any errors in formulae

Key word(s)

Data: eg text, number, formula
Tools and techniques: could include use of data validation, queries and connections, pivot tables, charts and graphs

Assessment guidance

Delivery and assessment
Evidence may be generated to meet the requirements of other units. 3.1–3.2 The learner should create a spreadsheet by identifying what data is required and how it should be structured. They should enter and edit data accurately. Data: numbers, charts, graphs, text, images, linked and embedded objects, references, lists. Structure: cells, rows, columns, tabs, pages, charts, ranges, workbooks, worksheets. 3.3–3.4 Learners should select and use a wide range of appropriate functions and formulas to meet calculation requirements and combine and link data from different sources. 3.5 Learners should select and use a range of tools and techniques to analyse and interpret data to meet requirements. 3.6 Learners should select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets. 3.7 Learners should select and use appropriate tools and techniques to generate, develop and format charts and graphs. 3.8 Learners should correct any errors in formulae. This learning outcome supports: • skills: IT, record and document production. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • products • observation • reflective account • witness statement • report.

Learning outcome 4

The learner will:

4   Be able to enter, edit and organise structured information in a database

The learner can:

4.1   Use **database tools and techniques** to record and update information

4.2   Check data using IT tools and make corrections as necessary
4.3   Create and run database queries to display, amend or calculate selected data
4.4   Plan, produce and present database reports

Key word(s)

Database: could include MIS systems, CRM, other commercial databases, eg MS Access
Tools and techniques: use of search queries

Assessment guidance

Delivery and assessment
Evidence may be generated to meet the requirements of other units. 4.1–4.2 The learner should use database tools and techniques to record and update information. They should check data using IT tools and make necessary corrections. 4.3 The learner should create and run database queries to display, amend or calculate selected data. 4.4 The learner should plan, produce and present database reports. This learning outcome supports: • skills: IT, record and document production. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.
Types of evidence
Evidence could include: • products • observation • reflective account • witness statement • report • discussion.

Learning outcome 5

The learner will:

5   Be able to perform financial processes using IT packages and systems relevant to the organisation

The learner can:

5.1   Explain the organisation's financial processes for sales invoicing, purchasing, payments and receipts

5.2   Perform **financial** processes relevant to their role
5.3   Maintain financial records appropriate to their role and in accordance with the processes of the organisation using an IT package or system

Key word(s)

Financial: could include purchase orders, invoices, expenses
Assessment guidance

Delivery and assessment
5.1 The explanation of financial processes should focus on the practical process but can be incorporated into the explanation of roles in Unit 02, learning outcome 4.3. 5.2–5.3 The learner must show how they contribute to the financial processes of the organisation through their own role. This could be as part of a project, sourcing supplies, maintaining resources, processing expense claims, etc. This learning outcome supports: • skills: IT, record and document production • knowledge: processes. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence must include: • products. Evidence could include: • observation • reflective account • witness statement • report • oral or written questioning.

Learning outcome 6

The learner will:

6   Be able to contribute to the development of the organisation's administrative systems

The learner can:

6.1   Produce a range of accurate **documents and records** without assistance
6.2   Create a proposal to improve a process used for document production or record keeping systems
6.3   Present the proposal to management in a suitable format

6.4   Review and give feedback on documents produced by others
6.5   Maintain accessible filing systems and records
6.6   Manage confidential information in compliance with organisational procedures

Key word(s)

Documents and records: could include emails, letters, reports, proposals, minutes, financial processes

Assessment guidance

Delivery and assessment
6.1 This requires that the learner demonstrates independence in producing documents. The documents could be those produced for other learning outcomes in this unit and should be completed to a high standard of accuracy. 6.2–6.3 The learner must create a proposal to improve a system which should be presented to management as a report, a PowerPoint presentation, or similar. It must include justifications for the improvement and the potential benefits of accepting the proposal. 6.4 The learner must show how they have used their experience and expertise to share administrative best practice in document production. 6.5–6.6 The learner must show that they can maintain and share with others either paper-based or electronic records, in compliance with data protection laws. This could include restricted access files, password protected files or use of secure cloud storage, following the procedures of their own organisation. This learning outcome supports: • skills: IT, record and document production, quality • knowledge: policies. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.
Types of evidence
Evidence must include: • products. Evidence could include: • observation • reflective account • witness statement • peer feedback • report • discussion.

Unit 06 Project management skills for business (H/617/9002)

Unit summary	This unit will provide learners with an understanding of how to manage a project, by applying project management principles and using project management tools. Learners will be able to scope, plan, manage and evaluate a project.
Guided learning hours	40
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1　　　Understand how to manage a project using relevant project management principles and tools

The learner can:

1.1　　Describe the features of a project business case
1.2　　Explain the stages of a **project lifecycle**
1.3　　Explain the roles of people involved in a project
1.4　　Explain the different aspects of a project plan
1.5　　Evaluate a range of **project planning and management tools**

Key word(s)

Project lifecycle: to include initiation, planning, execution and closure
Project planning and management tools: could include (but not limited to) Gantt chart, work breakdown structure, risk/impact probability chart

Assessment guidance

Delivery and assessment
1.1 The features of a business case could include, but are not limited to, rationale for the project, benefits, costs, return on investment, risks and options.
1.2 The learner should explain the key features of each stage of the project lifecycle.
1.3 The learner could select a project that they are involved in or are aware of. Roles could include those of the project manager, team members, stakeholders and project sponsor.
1.4 The learner could select a project that they are involved in or aware of. Different aspects could include objectives, key performance indicators (KPIs), tasks, timescales, resources (including people), contingencies, communication and evaluation mechanisms.
1.5 The learner should evaluate at least three project planning and management tools. This learning outcome supports: • knowledge: stakeholders, business fundamentals.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • written report • professional discussion • oral or written questioning.

Learning outcome 2

The learner will:

2   Be able to scope and plan a project using relevant project management principles and tools

The learner can:

2.1   Identify current project management principles and tools used within the organisation
2.2   Identify the scope and purpose of a project
2.3   Agree with stakeholders the objectives and scope of a proposed project
2.4   Plan required resources to successfully deliver a proposed project
2.5   Develop a project plan

Assessment guidance

Delivery and assessment
2.1 If necessary, the learner could identify project principles and tools within an organisation other than their own. Project management principles and tools could include the use of a project plan, IT software, Gantt charts, methodologies such as PRINCE2, Waterfall, Lean, Agile, Scrum, etc. 2.2–2.3 The learner needs to select a project on which they can manage. They will need to identify and communicate with stakeholders in order to agree the objectives and scope of the project. 2.4-2.5 The learner should develop a project plan The project plan should include SMART objectives, key performance indicators (KPIs), resource requirements and evaluation mechanisms appropriate to the plan. It should clearly identify resource requirements which could include staffing, equipment, facilities, finance and time. This learning outcome supports: • skills: planning and organisation, project management • knowledge: stakeholders, business fundamentals. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • report • observation • witness statement • professional discussion • oral or written questioning.

Learning outcome 3

The learner will:

3   Be able to manage a project

The learner can:

3.1   Implement plans within agreed budgets and timescales
3.2   Review regularly the progress and effectiveness of a project using information from a range of sources
3.3   Review and revise plans in the light of changing circumstances in accordance with project objectives and identified risks
3.4   Keep stakeholders up-to-date with project progress

Assessment guidance

Delivery and assessment
3.1–3.4 The learner should implement project plans using relevant project management principles and tools. These could include, but are not limited to, IT software, Gantt chart, work breakdown structure, risk/impact probability charts, etc. There should be evidence of reviews of all aspects of the project, including maintaining regular communication with stakeholders, seeking their views and revising project plans in order to stay on course. Some parts of this learning outcome can be cross-referenced to Unit 03, learning outcome 1. This learning outcome supports: • skills: communications, planning and organisation, project management • knowledge: stakeholders. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.
Types of evidence
Evidence could include: • written report • observation • witness statement

- professional discussion
- oral or written questioning
- products.

Learning outcome 4

The learner will:

4   Be able to evaluate a project

The learner can:

4.1   Evaluate the success of the project including the views of the stakeholders

Assessment guidance

Delivery and assessment
4.1 The evaluation should include consideration of how successfully each objective was met. It should include evaluation of the tasks, timescales, resources (including people), contingencies, communication, and the use of tools and techniques. Part of the evaluation could cross-reference to Unit 03, learning outcome 1. This learning outcome supports: • skills: record and document production, project management. • knowledge: stakeholders, business fundamentals. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.
Types of evidence
Evidence could include: • observation • witness statement • professional discussion • oral or written questions • products.

Unit 07 Development of self and others (K/617/9003)

Unit summary	Learners will be able to manage own personal and professional development and contribute to team cohesion and productivity through coaching others and sharing own expertise. Learners will also be able to make use of interpersonal skills to build and maintain positive working relationships.
Guided learning hours	30
Level	3
Mandatory/optional	Mandatory

Learning outcome 1

The learner will:

1   Be able to manage personal and professional development

The learner can:

1.1   Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
1.2   Plan personal and professional development that is consistent with business needs and personal objectives
1.3   Execute the plan within the agreed budget and timescale
1.4   Obtain feedback on performance from a range of valid sources
1.5   Review progress towards personal and professional objectives
1.6   Review and revise the personal and professional development plan in light of feedback received from others

Assessment guidance

Delivery and assessment
1.1 This should be an in depth look at the learner's role and how their current skills contribute to the team and the organisation, as well as evaluating what their future development needs will be as the organisation moves forward.

1.2, 1.3, 1.5 and 1.6 The learner's evidence should show that this has been an ongoing process over time. They should develop and agree a personal development plan, in consultation with others, which will give SMART targets that can be measured, reviewed and revised.

1.4 Evidence could be generated through the personal development plan but should also include feedback from others from internal or external sources. The feedback could be planned or unplanned.

This learning outcome supports:

• skills: quality
• knowledge: value of their skills, the organisation.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification. |

Types of evidence
Evidence could include: • products (eg personal development plan) • written report • reflective account • witness statement • peer feedback • written or oral questioning.

Learning outcome 2

The learner will:

2   Be able to contribute to team cohesion and productivity

The learner can:

2.1   Complete tasks, showing the necessary level of expertise
2.2   Consider ways to continuously improve their work
2.3   Perform tasks to a high standard, becoming a role model to peers and team members
2.4   Coach others to perform tasks required to meet team objectives
2.5   Show how they share own area of expertise with others
2.6   Share administrative best practice across the organisation

Assessment guidance

Delivery and assessment
2.1–2.2 The learner should be able to identify their own areas of expertise within their role. They should demonstrate how they have completed tasks which have used these areas of expertise. They should show that they evaluated the success or shortfalls of the completed tasks and demonstrate how they have applied themselves to make improvements to their knowledge or skills. 2.3–2.5 These can be the same or different tasks as in 2.1 but should demonstrate that others in the organisation have been influenced by their skills. They should show evidence of coaching others in the processes required to complete tasks and should show how they have passed on their expertise to others, either formally or informally. 2.6 This could be done either formally or informally, either face-to-face or in writing. It should focus on a specific administrative process which is required by the organisation. This learning outcome supports: • skills: interpersonal skills, quality, record and document production, planning and organisation. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • observation • reflective account • witness statement • peer feedback • products.

Learning outcome 3

The learner will:

3   Be able to use interpersonal skills to build and maintain positive working relationships

The learner can:

3.1   Develop and maintain positive working relationships within own team and across the organisation
3.2   Demonstrate ability to influence and challenge appropriately

Assessment guidance

Delivery and assessment
3.1 The learner must demonstrate their ability to interact successfully with others within the organisation through a positive attitude. They will develop and maintain positive working relationships by displaying good communication skills, empathy, active listening and flexibility. They should evidence the ability to collaborate and negotiate. Evidence should be collected over time in order to show that positive relationships have been maintained. 3.2 The learner must show that they can influence decisions or the views of others, giving the benefit of their expertise. They must be able to challenge others within the team or the organisation, showing an understanding of the organisation's aims and activities. This learning outcome supports: • skills: interpersonal skills. The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

Types of evidence
Evidence could include: • observation • witness statement • reflective account • peer feedback • products.

Section 3

Explanation of terms

Explanation of terms

This table explains how the terms used at Level 3 in the unit content are applied to this qualification (not all verbs are used in this qualification).

Apply	Explain how existing knowledge can be linked to new or different situations in practice.
Analyse	Break the subject down into separate parts and examine each part. Show how the main ideas are related and why they are important. Reference to current research or theory may support the analysis.
Clarify	Explain the information in a clear, concise way.
Classify	Organise according to specific criteria.
Collate	Collect and present information arranged in sequence or logical order.
Compare	Examine the subjects in detail and consider the similarities and differences.
Critically compare	This is a development of compare, where the learner considers the positive aspects and limitations of the subject.
Consider	Think carefully and write about a problem, action or decision.
Demonstrate	Show an understanding by describing, explaining or illustrating using examples.
Describe	Write about the subject giving detailed information in a logical way.
Develop (a plan/idea which…)	Expand a plan or idea by adding more detail and/or depth of information.
Diagnose	Identify the cause based on valid evidence.
Differentiate	Identify the differences between two or more things.
Discuss	Write a detailed account giving a range of views or opinions.
Distinguish	Explain the difference between two or more items, resources or pieces of information.
Draw conclusions (which…)	Make a final decision or judgement based on reasons.
Estimate	Form an approximate opinion or judgement using previous knowledge or considering other information.
Evaluate	Examine strengths and weaknesses, arguments for and against, and/or similarities and differences. Judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Reference to current research or theory may support the evaluation.
Explain	Provide detailed information about the subject with reasons showing how or why. Responses could include examples to support these reasons.

Extrapolate	Use existing knowledge to predict possible outcomes which might be outside the norm.
Identify	Recognise and name the main points accurately (some description may also be necessary to gain higher marks when using compensatory marking).
Implement	Explain how to put an idea or plan into action.
Interpret	Explain the meaning of something.
Judge	Form an opinion or make a decision.
Justify	Give a satisfactory explanation for actions or decisions.
Plan	Think about and organise information in a logical way using an appropriate format.
Perform	Carry out a task or process to meet the requirements of the question.
Provide	Identify and give relevant and detailed information in relation to the subject.
Review and revise	Look back over the subject and make corrections or changes.
Reflect	Learners should consider their actions, experiences or learning and the implications of this for their practice and/or professional development.
Select	Make an informed choice for a specific purpose.
Show	Supply evidence to demonstrate accurate knowledge and understanding.
State	Give the main points clearly in sentences or paragraphs.
Summarise	Give the main ideas or facts in a concise way.

Section 4

Additional information

Additional information

Resource requirements

There are no mandatory resource requirements for this qualification, but centres must ensure learners have access to suitable resources to enable them to cover all the appropriate learning outcomes.

Support for learners

Learner's Evidence Tracking Log (LETL)

The LETL covers the mandatory units in this qualification and it can help learners keep track of their work. This document can be downloaded free of charge from the Qualifications page on the NCFE website. You do not have to use the LETL – you can devise your own evidence tracking document instead.

Learning resources

We offer a wide range of learning resources and materials to support the delivery of our qualifications. Please check the Qualifications page on the NCFE website for more information and to see what is available for this qualification.

Contact us

NCFE
Q6
Quorum Park
Benton Lane
Newcastle upon Tyne
NE12 8BT

Tel: 0191 239 8000*
Fax: 0191 239 8001
Email: customersupport@ncfe.org.uk
Websites: www.ncfe.org.uk

** **To continue to improve our levels of customer service, telephone calls may be recorded for training and quality purposes.***