

# Pearson BTEC Level 1 Introductory in **Business**



## Specification

*First teaching from September 2019*

Pearson BTEC Level 1 Introductory Award in Business

Pearson BTEC Level 1 Introductory Certificate in Business

Pearson BTEC Level 1 Introductory Diploma in Business

**Issue 4**





**Pearson  
BTEC Level 1  
Introductory Award  
in Business**

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This specification is Issue 4. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on our website.

*References to third-party material made in this specification are made in good faith. We do not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)*

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# Welcome

With a track record built over 30 years of learner success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace either directly or via study at higher levels. Proof comes from YouGov research, which shows that 62% of large companies have recruited employees with BTEC qualifications.

## Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure. In this new BTEC Introductory Suite, the focus is on the development of both transferable and sector skills. The development of these skills is key in helping progression to further study – whether that be to other BTECs, to apprenticeships or to training. As we expect many learners to be studying functional skills or GCSEs alongside their BTEC we also offer support skills in English and maths.

When creating the BTEC Introductory Suite, we worked with colleges to ensure that learners' needs were met. The colleges told us that it is essential that Level 1 learners develop key progression skills in areas such as problem solving, communication and research.

We have addressed this through:

- offering a BTEC Introductory Award, a BTEC Introductory Certificate and a BTEC Introductory Diploma, each has a clear and distinct purpose, so there is something to suit every learner's choice of study programme and progression plan
- new skills-focused content closely aligned with what centres need in supporting their learners to become part of a skilled workforce
- graded assessments in every unit to help learners progress to the next stage of their personal journey, whether to further education or to the world of work.

## A word to learners

Today's BTEC Introductory qualifications will demand a lot of practical work from you. You will complete a range of units, be organised, take assessments that will demonstrate your skills and keep a portfolio of your assignments. You can feel proud in achieving a BTEC because, whatever your plans, success in your BTEC Introductory Award, Certificate or Diploma will help you progress to the next stage of your learning.

Good luck, and we hope you enjoy your course.

## Summary of BTEC Level 1 Introductory Award, Certificate and Diploma in Business Issue 4 changes

Summary of changes made between the previous issue and this current issue	Page number
The wording under <i>Section 8 Final grading and awarding</i> subsection <i>Calculation of the qualification grade</i> has been updated to clarify current practice in ensuring maintenance and consistency of qualification standards.	Page 133
The wording in <i>Section 9 Administrative arrangements</i> subsections <i>Learner malpractice</i> and <i>Teacher/centre malpractice</i> have been updated to clarify suspension of certification in certain circumstances.	Page 138

## Summary of BTEC Level 1 Introductory Award, Certificate and Diploma in Business Issue 3 changes

Summary of changes made between Issue 2 and Issue 3	Page number
The BTEC Level 1 Introductory Award in Business has been added to the specification title.	Title page
The BTEC Level 1 Introductory Award in Business has been added to the Welcome message.	Welcome page
References to the BTEC Level 1 Introductory Award in Business have been added to the <i>Overview of the BTEC Introductory qualifications</i> pages.	Pages 1 and 2
The BTEC Level 1 Introductory Award in Business has been added to <i>Section 1 Qualification Purpose and Objectives</i> .	Pages 6 and 7
In <i>Section 1 Qualification purpose and objective, Who are the qualifications for?</i> has been changed to include all learners.	Page 6
The structure for the BTEC Level 1 Introductory Award in Business has been added to <i>Section 2 Structure</i> and the structures for the Certificate and Diploma have been updated.	Pages 8 and 9
One new unit has been added to the specification. <i>B13 Developing Routine Office Administration Skills</i> .	Pages 111-119
The BTEC Level 1 Introductory Award in Business has been added to <i>Section 4 Planning your programme</i> .	Page 121
Detail on understanding the qualification grades for the BTEC Level 1 Introductory Award in Business has been added to <i>Section 8 Understanding the Qualification Grade</i> .	Pages 138-140
References to internal units have been removed from <i>Points available for units</i> .	Page 139

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](https://qualifications.pearson.com/en/support/contact-us.html).

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# Overview of the BTEC Introductory qualifications

This specification contains the units and information you need to deliver the new Pearson BTEC Level 1 Introductory Award, Certificate or Diploma in Business. It includes all the units for these qualifications. This specification also signposts additional handbooks and policies.

These qualifications are part of the new suite of BTEC Introductory qualifications offered by Pearson. This suite has been designed primarily for pre-16 to 19+ learners who wish to achieve at Level 1 qualification in preparation for future study. The qualifications are not designed to lead directly to employment but will maximise opportunities for learners to progress by focusing on the development of transferable and sector-related skills. The qualifications have been designed explicitly to meet the needs of this group of learners in terms of content, assessment and progression. For learners who do not want to specialise in one particular sector, we offer a Vocational Studies qualification in the Award, Certificate and Diploma sizes. The Vocational Studies qualification gives learners the opportunity to study units from across the sectors.

The qualifications have been created in line with the ethos and recommendations of study programmes for pre-16 to 19+ year olds and recommendations from centres. The qualifications are designed to meet Ofqual requirements.

All qualifications across the suite share common core units as these units contain the generic attributes learners need to be able to progress to further study. The qualification titles are given below with the size of the qualification in guided learning hours (GLH).

These new graded qualifications provide a broad introduction to a sector and give learners the opportunity to demonstrate increased skill levels. Learners will develop the necessary transferable and sector skills to progress more quickly. The qualifications prepare learners for progression to Level 2 BTECs or other study programmes. They provide for progression by either meeting entry requirements in their own right or by being accepted alongside other qualifications at the same level and adding value to them; typically alongside maths and English studies.

In the business sector the qualifications are:

Pearson BTEC Level 1 Introductory Award in Business (70 GLH)  
(Qualification Number 603/5134/2)

Pearson BTEC Level 1 Introductory Certificate in Business (180 GLH)  
(Qualification Number 601/8573/9)

Pearson BTEC Level 1 Introductory Diploma in Business (360 GLH)  
(Qualification Number 601/8574/0)

The information in this specification is correct at the time of publication.

## Qualifications, sizes and purposes at a glance

Title	Size and structure	Summary purpose
<b>Pearson BTEC Level 1 Introductory Award in Business</b>	70 GLH Two units must be achieved, of which one must be taken from Core Skills (Group A), Developing a Personal Progression Plan and one unit from the sector options (Group B).	Designed for learners wishing to gain an introduction to a chosen vocation area. The Award offers the opportunity for learners to study a sector unit and plan for their next steps by completing the mandatory unit: <i>Developing a Personal Progression Plan</i> .
<b>Pearson BTEC Level 1 Introductory Certificate in Business</b>	180 GLH Five units must be achieved, of which two must be taken from the Core Skills (Group A), and three from Sector Skills (Group B).	Designed for learners who may be ready to progress quickly to further study, the Certificate offers a basic introduction to the business sector. It could form part of a study programme that includes other appropriate subjects such as English and maths.
<b>Pearson BTEC Level 1 Introductory Diploma in Business</b>	360 GLH Ten units must be achieved, of which four must be taken from the Core Skills (Group A), and six from Sector Skills (Group B).	Designed to be taken over one year, giving learners the opportunity to develop a range of skills in the business sector and supporting progression on to further study. It could be a substantial vocational qualification within a study programme that includes other appropriate subjects such as English and maths.

### Total Qualification Time

For all regulated qualifications, Pearson specifies a total number of hours of study that it is expected learners will be required to undertake in order to complete the qualification: this is the Total Qualification Time (TQT). This is calculated for the average learner. Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we expect a centre delivering the qualification to provide.

Guided learning means activities, such as lessons, tutorials, supervised study and supervised assessments, that directly involve tutors and assessors in teaching, supervising and invigilating learners. TQT includes other required learning such as private study, preparation for assessment and undertaking assessment when not directly under supervision.

The Pearson BTEC Level 1 Introductory Award in Business is a qualification having:

- Total Qualification Time: 75 hours
- Guided Learning: 70 hours.

The Pearson BTEC Level 1 Introductory Certificate in Business is a qualification having:

- Total Qualification Time: 195 hours
- Guided Learning: 180 hours.

The Pearson BTEC Level 1 Introductory Diploma in Business is a qualification having:

- Total Qualification Time: 390 hours
- Guided Learning: 360 hours.

Centres should take note of these hours in planning their programme but may use their professional judgement to determine the provision of guided learning and study time across the units.

## Qualification and unit content

Pearson has developed the content of the new BTEC Introductory qualifications through consultation with further education representatives and other centres that deliver qualifications at this level. This has helped us to design qualifications with a focus on skills development rather than knowledge, therefore avoiding duplication of learning at a higher level and focusing on the broader skills that learners need for progression.

The purpose of these qualifications is to develop the transferable skills, attributes and behaviours needed for learners to progress to further study and ultimately to employment. The qualifications are designed to be delivered in an applied way, bringing together appropriate content with practical and technical skills.

As a Level 1 qualification the pass standard requires learners to complete routine, simple and directed tasks by applying their knowledge and skills. It is expected that learners complete tasks fully under supervision, direction or with guidance. At merit and distinction levels, learners may be expected to complete tasks in greater detail or with greater confidence or independence.

### Transferable Skills coverage

The development of transferable and sector skills is the main focus. We intend for every learner to have the opportunity to develop key transferable skills through both core and sector units. This will help learners to appreciate how the transferable skills they develop in their core units can be contextualised in the sector they are studying. On completion of their course, learners will have developed a set of transferable and sector skills that will benefit them whatever their chosen progression route. The transferable skills covered in the units are summarised in the grid below.

<b>Communication</b> <ul style="list-style-type: none"><li>• Writing, speaking and listening to others</li><li>• Using body language to help communication</li><li>• Using communication for different purposes</li><li>• Communicating in a variety of ways, including electronic and social media</li></ul>
<b>Working with others</b> <ul style="list-style-type: none"><li>• Setting common goals</li><li>• Showing respect for others in the team and valuing their contributions</li><li>• Listening to others in the team, being open minded</li><li>• Taking on roles and responsibilities</li></ul>
<b>Problem solving</b> <ul style="list-style-type: none"><li>• Identifying issues by being able to examine information</li><li>• Dealing with change</li><li>• Decision making to find solutions</li><li>• Staying with a problem until it is resolved</li><li>• Using IT to help solve problems</li></ul>
<b>Managing information</b> <ul style="list-style-type: none"><li>• Collecting and using information from different sources</li><li>• Determining relevance and accuracy of information</li><li>• Organising information</li><li>• Representing information in different ways</li><li>• Using IT to present and store information</li></ul>
<b>Self-management and development</b> <ul style="list-style-type: none"><li>• Setting goals and planning ahead</li><li>• Being proactive and flexible</li><li>• Being resilient and able to work under pressure</li><li>• Monitoring performance and devising strategies for improvement</li><li>• Using IT for time management</li></ul>

## Sector skills coverage

The sector units introduce learners to some broad sector skills and to some underpinning knowledge of a vocational sector. This will help learners to prepare for progression and ensures that the approach to delivery is practical, active, contextualised and skills based.

## Functional skills

The units in this specification signpost opportunities for learners to develop functional skills in English and mathematics.

## Assessment

Assessment is designed to fit the purpose and objective of the qualification and all units are internally assessed – giving learners the opportunity to demonstrate skills developed in applied scenarios. There is a range of assessment styles suited to skills- and sector-based qualifications at this level. All units are graded to encourage skills development and performance.

These qualifications consist of two types of unit. Group A units are the core skills units, they cover content designed to reflect the skills and behaviours needed to progress to further study. Group B units are made up of sector units containing sector-specific content to enable learners to develop sector-specific skills and some knowledge to support progression to the next stage of vocational learning.

Units from Group A and Group B may assess the same transferable skills. Where this occurs, you may opt to deliver these units simultaneously. This is acceptable providing the delivery is planned appropriately and that all learning aims for both types of unit are met and covered in the assessment. You are not permitted to deliver a unit and then use the learner's evidence from the unit to achieve another unit.

## Internally-assessed units

All units in these qualifications are internally assessed and subject to external standards verification. This means that you set and assess the assignments that provide the final summative assessment for each unit – you can use the examples and support that we give in the units. If you are not an approved centre already, before you assess you will need to become one in order to register learners. You will need to prepare to assess using the guidance in *Section 7*.

In line with the requirements and guidance for internal assessment, you select the most appropriate assessment styles according to the learning set out in the unit. This ensures that learners are assessed using a variety of styles to help them develop a broad range of transferable skills. Learners could be given opportunities to:

- carry out practical tasks
- present information that they have gathered
- keep working logbooks, records and reflective journals
- practise English and mathematical skills
- take part in oral or written presentations
- take part in role play, interviews and other activities.

You will make grading decisions based on the requirements and supporting essential guidance given in the units. See *Section 5* for rules on resubmission and retakes.

## Language of assessment

Assessment of the internal units for these qualifications will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British sign language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 6*.

## Grading for units and qualifications

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. Grading has been introduced at this level as a result of feedback from users and practitioners of BTEC qualifications.

All units contribute proportionately, based on the Guided Learning (GLH) to the overall qualification grade.

Qualifications in the suite are graded using a scale of P to D, **or** PP to DD. Please see *Section 9* for more details. The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualifications.

# 1 Qualification objectives and purpose

## **Pearson BTEC Level 1 Introductory Award, Certificate and Diploma in Business**

In this section you will find information on the purpose of the qualifications and how their design meets that purpose. On our website we publish a Statement of Purpose for each qualification. These Statements are designed to guide you and potential learners to make the most appropriate choice about which qualification is most suitable at recruitment.

### **What is the purpose of these qualifications?**

The Pearson BTEC Level 1 Introductory Award, Certificate and Diploma in Business are designed around practical skills and tasks that place an emphasis on learners demonstrating what they can do rather than what they know in theory. The qualifications give learners the opportunity to acquire and develop generic, transferable and sector-specific skills in order to complete tasks and demonstrate a level of achievement that enables them to progress to further learning.

The Award offers a basic introduction to the business sector and could be studied alongside other subjects.

The Certificate offers an introduction to the business sector and could be studied alongside other subjects in a study programme.

The Diploma gives learners the opportunity to develop a broader range of skills in the business sector.

### **Who are these qualifications for?**

The Pearson BTEC Level 1 Introductory Award, Certificate and Diploma in Business are primarily for all learners who want to continue their education and develop their skills for progression to further learning and, ultimately, to employment.

The Award is suitable for learners studying part time or for those who wish to study a vocational qualification alongside other qualifications and activities as part of their study programme.

The Certificate is designed for learners who may be ready to progress quickly to further study.

The Diploma is designed to be taken over one year, as a substantial vocational qualification within a study programme.

### **What do these qualifications cover?**

The content of these qualifications has been developed in consultation with further education colleges and other providers to ensure that the qualifications support progression to further learning and training. All learners taking these qualifications will study core units that focus on key transferable skills such as research and planning, time management and working with others. Learners will also take a number of sector units. The content of the sector units offer a broad introduction to the skills and knowledge within that sector allowing the delivery to be practical and active in order to engage the learners. For business, the units cover activities such as role-playing customer service situations, pitching business ideas and creating visual displays.

### **What could these qualifications lead to?**

These qualifications prepare learners for further learning at a higher level in business. The development of transferable skills means that learners can also choose a study programme from alternative sectors. For example, these qualifications in business could lead to Pearson BTEC Level 2 qualifications in this sector, or to the Pearson BTEC Level 2 Apprenticeship in Retail, or to Level 2 qualifications in other sectors.



## **How do these qualifications enable learners to progress?**

The mode of delivery and assessment in the units is designed to build awareness of a sector and the skills required to work in it. Learners will be given contexts and scenarios to help them develop skills and to acquire knowledge through application. Learners will not develop all the knowledge and skills needed to enter the labour market in a given sector but will develop pre-employability skills and contextualised knowledge to allow them to progress to further learning and training and, ultimately, to become successful in their chosen sector.

The Award, Certificate and Diploma all contain a mandatory unit: *Developing a Personal Progression Plan*, that enables learners to consider their next steps in learning.

## **How do the Award, Certificate and Diploma sizes differ in purpose?**

The Award is suitable for learners studying part time or for those who want an introduction to a vocational qualification alongside other qualifications and activities as part of their study programme.

The Certificate is suitable for learners studying part time or for those who wish to study a vocational qualification alongside other qualifications and activities as part of their study programme.

The Diploma is twice the size of the Certificate and will form a substantial element of a learner's study programme. By providing a broader sector experience the Diploma will suit learners who have a clear indication of the sector they wish to study further. The Diploma encourages learners to take on some individual research, enabling them to be further prepared for higher-level learning.

## 2 Structure

### Pearson BTEC Level 1 Introductory Award in Business

Two units must be achieved, one of which must be Developing a Personal Progression Plan (Group A) and one unit from the sector options (Group B)

Pearson BTEC Level 1 Introductory Award in Business			
Unit reference	Unit title	GLH	Type
<b>Core</b>	<b>Group A units – learners must complete one unit</b>		
<b>A2</b>	Developing a Personal Progression Plan	<b>30</b>	<b>Core</b>
<b>Sector</b>	<b>Group B units – learners must complete one unit</b>		
<b>B5</b>	Finding Out About Businesses in Your Area	<b>40</b>	<b>Sector</b>
<b>B6</b>	Organising a Meeting	<b>40</b>	<b>Sector</b>
<b>B7</b>	Branding a Product	<b>40</b>	<b>Sector</b>
<b>B8</b>	Creating a Visual Display	<b>40</b>	<b>Sector</b>
<b>B9</b>	Presenting a Business Idea	<b>40</b>	<b>Sector</b>
<b>B10</b>	Contribute to Running an Event	<b>40</b>	<b>Sector</b>
<b>B11</b>	Recording Income and Expenditure	<b>40</b>	<b>Sector</b>
<b>B12</b>	Communicating with Customers	<b>40</b>	<b>Sector</b>
<b>B13</b>	Developing Routine Office Administration Skills	<b>40</b>	<b>Sector</b>

### Pearson BTEC Level 1 Introductory Certificate in Business

Learners must complete both core units and three sector units.

Pearson BTEC Level 1 Introductory Certificate in Business			
Unit reference	Unit title	GLH	Type
<b>Core</b>	<b>Group A units – learners must complete both units</b>		
<b>A1</b>	Being Organised	<b>30</b>	<b>Core</b>
<b>A2</b>	Developing a Personal Progression Plan	<b>30</b>	<b>Core</b>
<b>Sector</b>	<b>Group B units – learners must complete three units</b>		
<b>B5</b>	Finding Out About Businesses in Your Area	<b>40</b>	<b>Sector</b>
<b>B6</b>	Organising a Meeting	<b>40</b>	<b>Sector</b>
<b>B7</b>	Branding a Product	<b>40</b>	<b>Sector</b>
<b>B8</b>	Creating a Visual Display	<b>40</b>	<b>Sector</b>
<b>B9</b>	Presenting a Business Idea	<b>40</b>	<b>Sector</b>
<b>B10</b>	Contribute to Running an Event	<b>40</b>	<b>Sector</b>
<b>B11</b>	Recording Income and Expenditure	<b>40</b>	<b>Sector</b>
<b>B12</b>	Communicating with Customers	<b>40</b>	<b>Sector</b>
<b>B13</b>	Developing Routine Office Administration Skills	<b>40</b>	<b>Sector</b>

## Pearson BTEC Level 1 Introductory Diploma in Business

Learners must complete all core units and six sector units.

Pearson BTEC Level 1 Introductory Diploma in Business			
Unit reference	Unit title	GLH	Type
<b>Core</b>	<b>Group A units – learners must complete all units</b>		
<b>A1</b>	Being Organised	<b>30</b>	<b>Core</b>
<b>A2</b>	Developing a Personal Progression Plan	<b>30</b>	<b>Core</b>
<b>A3</b>	Working with Others	<b>30</b>	<b>Core</b>
<b>A4</b>	Researching a Topic	<b>30</b>	<b>Core</b>
<b>Sector</b>	<b>Group B units – learners must complete six units</b>		
<b>B5</b>	Finding Out About Businesses in Your Area	<b>40</b>	<b>Sector</b>
<b>B6</b>	Organising a Meeting	<b>40</b>	<b>Sector</b>
<b>B7</b>	Branding a Product	<b>40</b>	<b>Sector</b>
<b>B8</b>	Creating a Visual Display	<b>40</b>	<b>Sector</b>
<b>B9</b>	Presenting a Business Idea	<b>40</b>	<b>Sector</b>
<b>B10</b>	Contribute to Running an Event	<b>40</b>	<b>Sector</b>
<b>B11</b>	Recording Income and Expenditure	<b>40</b>	<b>Sector</b>
<b>B12</b>	Communicating with Customers	<b>40</b>	<b>Sector</b>
<b>B13</b>	Developing Routine Office Administration Skills	<b>40</b>	<b>Sector</b>

# 3 Units

## Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment.

Each unit in the specification is set out in a similar way. This section explains how the units work. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme read and are familiar with the information given in this section.

Section	Explanation
<b>Unit number</b>	The numbering of the core units is sequential from A1–A4. The numbering of the sector units is preceded by an abbreviation of the sector plus the number of the unit, e.g. HSC1, HSC2.
<b>Unit title</b>	This is the formal title used and it appears on certificates.
<b>Level</b>	All units are at Level 1 as outlined in the Ofqual level descriptors.
<b>Unit type</b>	This shows whether a unit is a core or sector unit. See structure information in <i>Section 2</i> for full details.
<b>GLH</b>	Units may have a value of 30 or 40 Guided Learning Hours GLH. This indicates the number of hours of teaching, directed activity and assessment expected.
<b>Unit in brief</b>	A brief formal statement of the content and the skills learners will develop through the unit. You can use this in summary documents, brochures etc.
<b>Unit introduction</b>	This is designed with learners in mind. It indicates why the unit is important, how learning is structured and how learning might be applied when progressing to further education.
<b>Unit summary</b>	This section helps tutors to see at a glance the main content and skills in the unit presented against the learning aims. The suggested assessment evidence is suitable to fulfil the requirements of the unit.
<b>Functional skills</b>	This table summarises opportunities for functional skills development in the unit.
<b>Unit content</b>	This section sets out the required teaching content of the unit. Content is compulsory except when an 'e.g.' is given. Learners should be asked to complete summative assessment only after the teaching content for the unit has been covered.
<b>Learning aims</b>	Learning aims help to define the scope and style of learning of the unit. They define the context within which the learner develops their skills and how they will demonstrate those skills.
<b>Assessment criteria</b>	Each learning aim has assessment criteria to explain the achievement required to obtain Pass, Merit and Distinction grades. A glossary of the terms used in the assessment criteria is given in <i>Appendix 1</i> . All assessors need to understand our expectations of the terms used.

Section	Explanation
<b>Essential information for assessment decisions</b>	This section gives holistic guidance on the learning aims and associated assessment criteria. It explains what the learner must provide as evidence to reach the Pass, Merit and Distinction standard. This section also gives examples and clarification.
<b>Essential resources</b>	This section lists specific resources that are essential for teaching and assessing the unit. For information on support resources see <i>Section 10</i> .
<b>Delivery guidance</b>	This section gives suggestions of ways of delivering the unit. It offers ideas of practical activities in sector contexts that can be used to help develop relevant skills and to encourage learner progress.
<b>Suggested assessment activity</b>	This section suggests scenarios and tasks that can be used in summative assessment activities.





## Index of units

This section contains all the units developed for these qualifications. Please refer to *page 8* to check which units are available for the business qualifications.

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Unit B13:	Developing Routine Office Administration Skills	111



# Unit A1: Being Organised

Level: **1**

Unit type: **Core**

Guided learning hours: **30**

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## Unit in brief

Learners will develop key techniques to help organise their work and priorities and manage their time effectively.

## Unit introduction

How often do you run out of time to do tasks? Do you ever miss the bus or turn up late for college? Being organised and being able to manage your time is essential for success in your education.

From creating to-do lists and filing systems to setting up your phone for alerts and alarms, this unit will introduce you to ways that will help you to plan and use your time effectively, as well as organising yourself and your work. After learning and practising these techniques, you will have the opportunity to put them into practice over a period of time, reviewing how successful they were and whether they improved your organisational skills.

The skills you learn in this unit are key for progression to the next stage in your education. They are also crucial for work and life.

## Learning aims

In this unit you will:

- A** Explore techniques to improve own organisational skills
- B** Review the use of techniques to improve own organisational skills.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Explore techniques to improve own organisational skills	<ul style="list-style-type: none"><li>Techniques to improve organisation</li></ul>	<ul style="list-style-type: none"><li>A planner for a two-week period.</li><li>Supporting documentation that demonstrates the techniques used.</li></ul>
<b>B</b> Review the use of techniques to improve own organisational skills		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>This unit can be delivered in a sector context.</li></ul>	<ul style="list-style-type: none"><li>Organisational skills</li><li>Time management</li><li>Use of ICT management tools</li></ul>	<ul style="list-style-type: none"><li>Planning</li><li>Managing information</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Write clearly and coherently, including an appropriate level of detail.</li> <li>Ensure written work includes generally accurate punctuation and spelling, and that meaning is clear.</li> </ul>
<b>Maths</b>	<ul style="list-style-type: none"> <li>Solve problems requiring calculations with common measures, including time and money.</li> </ul>

## Unit content

### Knowledge and sector skills

#### Techniques to improve organisation

Learners will practise skills and techniques to improve their organisation over a period of time before final assessment.

- Time-management techniques:
  - produce daily or weekly to-do lists or action plans to meet deadlines
  - prioritise tasks
  - create a checklist of tasks that need to be completed, reviewing it regularly
  - consider how long each task might take
  - use free calendar software to keep timings of lessons and work
  - allow a little extra time in case longer is spent on one task than expected
  - foresee problems and plan ways to overcome them
  - review priorities.
- Organisational techniques:
  - ensure there is access to required resources to complete tasks such as notebooks, pens, laptops, tablets
  - use organisational stationery such as folders, dividers, highlighters
  - set up and manage a filing system of work and emails to allow for quick and easy access
  - use alerts on phones and other digital devices
  - use project plans and spreadsheets for organisation and budgeting
- Planners to organise time:
  - different types of planner such as wall planners, calendars, electronic and/or online planners
  - using them daily, weekly or monthly
  - keeping them updated and reviewing the priorities.
- Review own time-management and organisational skills through identifying:
  - strengths and weaknesses of techniques used
  - why some techniques worked better than others
  - ways to improve own time management and organisation.

#### Transferable skills

- Planning: using time-management techniques.
- Managing information: prioritising information received and using ICT to organise and manage time.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore techniques to improve own organisational skills</b>		
<b>A.P1</b> Use limited techniques to improve own organisational skills.	<b>A.M1</b> Use appropriate techniques to improve own organisational skills.	<b>A.D1</b> Use appropriate and effective techniques to improve own organisational skills.
<b>Learning aim B: Review the use of techniques to improve own organisational skills</b>		
<b>B.P2</b> Identify the techniques used to improve own organisational skills, giving outline examples.	<b>B.M2</b> Review the techniques used, giving some examples of how they improved own organisational skills.	<b>B.D2</b> Review the techniques used, giving detailed examples of how they improved own organisational skills.



## Essential information for tutors

Units from Group A and Group B may assess the same transferable skills. Where this occurs, you may opt to deliver these units simultaneously. This is acceptable providing the delivery is planned appropriately and that all learning aims for both types of unit are met and covered in the assessment. You are not permitted to deliver a unit and then use learners' evidence from the unit to achieve another unit.

## Essential information for assessment decisions

**For distinction standard**, learners:

- demonstrate that they have tried out a full range of techniques to organise themselves. This could include evidence of prioritising tasks, to-do lists, action planning with detailed timings, screenshots of folder organisation and online calendar alerts, as well as time allocated for homework
- will review the success of the techniques they used, giving full examples of how they improved their own organisation, making some links on how they could use the techniques again.

**For merit standard**, learners:

- demonstrate that they have used a range of mostly suitable techniques for the tasks they have to complete. This could include evidence of to-do lists, some basic action planning with timings and perhaps some evidence of the use of ICT features to organise their time
- will provide a review that outlines the techniques used. They will give some relevant examples, demonstrating some reflection on how the use of these techniques improved their own organisation.

**For pass standard**, learners:

- demonstrate that they have used a small number of simple organisational techniques, e.g. to-do lists and phone alerts and perhaps some folder management
- will list the techniques they used and will provide some outline examples of how they may use them again.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Prioritising tasks

Learners begin this workshop in small groups to complete a task. Tutors can give different scenarios for each group to work with. Ideally, the tasks should be familiar topics to learners such as planning a shopping trip at the weekend. Learners will need to consider where they are going, how they will get there, what it will cost and how much time they have. Using the information, learners can then make a list of the tasks in order of priority and timing.

**Suggested time:** about 2 hours.

### Planning your time

Tutors explain the importance of planning time to meet deadlines. Learners fill in a blank timetable page, identifying when their lessons are and when they have deadlines for work to be completed.

**Suggested time:** about 1 hour.

### Use of own devices to help organisation

Tutors ask learners to investigate what they have on their phones or other devices that could help to organise their time. This could include phone alerts, free software or a calendar.

**Suggested time:** about 1 hour.

### Filing and folders

Tutors talk through the importance of naming and labelling folders (electronic and hard copies) for ease of reference and access. This could be through colour coding, using stickers or labels. Learners work through their folders, using some of the filing and labelling techniques they have learned.

**Suggested time:** about 2 hours.

### Using a planner to organise own time

Tutors talk through the various types of planner that could be used to organise own time such as wall planners, calendars, electronic and/or online planners. They also talk through how they can be used daily, weekly or monthly to prioritise key tasks and plan ahead.

In pairs, learners fill in a weekly planner for their partner, talking through what the key priorities are for the week for each of them and identifying ways to manage their time.

Each person presents the planner for their partner.

**Suggested time:** about 2 hours.

### Meeting deadlines in your sector

Learners plan their time around the date for completing a particular activity or task on their course.

They make a list of key tasks and show how long each one could take. They then start at the hand-in date and work back to the beginning of the project.

Learners then use the plan and monitor its effectiveness as they progress through it. Learners should also build in contingencies and consider what obstacles there may be to prevent them achieving the end goal on time.

**Suggested time:** about 3 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You have been asked to produce a planner for a set period of time during your course. The time period should be between two and four weeks. Your planner should identify days and times in the week that are blocked out for lessons, work, and sport and leisure activities. You should then demonstrate how you are going to organise yourself and the available time to complete all the tasks you need to in a given timeframe to ensure that you meet all the deadlines.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

Complete a study plan for a particular assignment or activity in your sector units.



# Unit A2:            Developing a Personal Progression Plan

Level: **1**

Unit type: **Core**

Guided learning hours: **30**

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## Unit in brief

Learners will develop the skills and behaviours needed to progress to the next stage in their learning, identifying progression opportunities and creating a plan to enable them to get there.

## Unit introduction

What would you like to do when you finish this course? Perhaps you would like to spend more time learning about the subject you are studying at the moment? Or you may want to do something completely different. Before you decide what your next step is, you need to know what you are good at, what your interests are and what your end goal is.

This unit will help you find out what opportunities are available to you and how to get to the next stage. You will carry out a self-audit, identifying what your strengths are and what you need to develop to be able to meet your progression goals. You will learn how to set goals and plan ways to achieve them. You will then produce a personal progression plan to help you reach the next step in your life.

The skills you develop in this unit will be good preparation when applying for another course or training programme.

## Learning aims

In this unit you will:

- A** Explore the skills and behaviours needed to meet personal progression goal
- B** Produce a progression plan to meet intended progression goal.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Explore the skills and behaviours needed to meet personal progression goal  <b>B</b> Produce a progression plan to meet intended progression goal	<ul style="list-style-type: none"> <li>• Benefits and purpose of developing a progression plan</li> <li>• Finding out about progression opportunities</li> <li>• Setting a progression goal</li> <li>• Identifying the skills and behaviours needed to meet progression goal</li> <li>• Reviewing own skills and behaviours against progression goal</li> <li>• Creating a progression plan</li> </ul>	<ul style="list-style-type: none"> <li>• Audit of skills and behaviours.</li> <li>• Personal progression plan.</li> </ul>
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"> <li>• Learners can reflect on the sector skills they have developed when considering their progression goal.</li> </ul>	<ul style="list-style-type: none"> <li>• Sources of information about progression opportunities and requirements</li> <li>• Producing a progression plan</li> </ul>	<ul style="list-style-type: none"> <li>• Written communication</li> <li>• Managing information</li> </ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>• Make relevant and extended contributions to discussions, allowing for and responding to others' input.</li> <li>• Prepare for and contribute to the formal discussion of ideas and opinions.</li> </ul>



## Unit content

### Knowledge and skills

#### Benefits and purpose of developing a progression plan

- Gives direction and focus to short-term and long-term goals.
- Sets out the key steps to achieve progression goal.
- Allows for discussion with others, e.g. tutors, parents, peers.
- Gives time for reflection on what is achievable and realistic.

#### Finding out about progression opportunities

- Progression opportunities such as to further learning, work or apprenticeships.
- Local sources of information about potential progression routes such as colleges, careers fairs.
- Sources of advice and guidance for progression.
- Tutor advice.
- Careers advice.
- Entry requirements such as baseline entry qualifications, an entry interview, portfolio.

#### Setting a progression goal

- Matching own skills and behaviours with progression goals.
- Deciding on the next step, e.g. using SMART (specific, measureable, achievable, realistic, time-bound) targets.
- Using research findings to identify the requirements to meet goals.
- Setting a progression goal to work towards.

#### Identifying the skills and behaviours needed to meet progression goal

- Skills needed to meet progression goal:
  - transferable skills, e.g. communication, working with others, problem solving
  - employability skills, e.g. IT skills, being able to drive.
- Behaviours needed for progression goal, e.g. reliability, efficiency, being trustworthy.
- Qualifications needed for progression, e.g. level of English and maths.

#### Reviewing own skills and behaviours against progression goal

- Carrying out a self-audit of skills and behaviours using past experience of education and learning.
- Gathering feedback from others about own strengths and areas for improvement.
- Attitudes and behaviours needed for progression.

#### Creating a progression plan

To include:

- short-term and long-term progression goals
- identification of key activities needed to move towards the progression goal
- key actions to improve skills and behaviours
- key milestones to achieve goal, e.g. interview dates, application deadlines
- realistic timelines to meet goal.

### Transferable skills

- Written communication: filling out application forms, progression plan.
- Managing information: from the sources used to find out about possible progression routes.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore the skills and behaviours needed to meet personal progression goal</b>		
<b>A.P1</b> Identify an intended progression goal.	<b>A.M1</b> Identify a clear progression goal with some details of the skills and behaviours needed to achieve it.	<b>A.D1</b> Identify a realistic progression goal with details of the skills and behaviours needed to achieve it.
<b>A.P2</b> Outline the skills and behaviours needed to meet personal progression goal.	<b>A.M2</b> Identify how own skills and behaviours meet personal progression goal.	<b>A.D2</b> Describe how own skills and behaviours meet personal progression goal.
<b>Learning aim B: Produce a progression plan to meet intended progression goal</b>		
<b>B.P3</b> Produce an outline progression plan to meet intended progression goal.	<b>B.M3</b> Produce a clear progression plan, identifying some steps towards meeting intended progression goal.	<b>B.D3</b> Produce a detailed and achievable progression plan, identifying most of the steps needed to meet intended progression goal.

## Essential information for tutors

Units from Group A and Group B may assess the same transferable skills. Where this occurs, you may opt to deliver these units simultaneously. This is acceptable providing the delivery is planned appropriately and that all learning aims for both types of unit are met and covered in the assessment. You are not permitted to deliver a unit and then use learners' evidence from the unit to achieve another unit.

## Essential information for assessment decisions

### For distinction standard, learners:

- set a progression goal that demonstrates evidence of focused research from different sources, showing a clear and detailed understanding of the skills and behaviours needed to achieve it
- carry out an insightful review of own skills and behaviours, using feedback from others and evidence of self-reflection on how own skills and behaviours match those needed to meet the progression goal
- produce a focused progression plan that gives details on the required skills, behaviours and qualifications and produce a detailed plan on the next steps needed to meet the progression goal.

### For merit standard, learners:

- set a focused progression goal that demonstrates evidence of finding out information from different sources, showing some understanding of the skills and behaviours needed to achieve it
- carry out a review of own skills and behaviours, using some feedback from others and give some detail on how own skills and behaviours match those needed for the progression goal
- produce a coherent progression plan that outlines some of the skills, behaviours and qualifications needed to meet the goal and covers most of the steps needed to achieve it.

### For pass standard, learners:

- set a broad progression goal that shows limited evidence of finding out information from sources
- list the skills and behaviours needed to meet the goal
- produce a basic progression plan that gives broad and unfocused information on how they intend to meet their progression goal.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### What are my progression opportunities?

In groups, learners discuss the progression opportunities that may be available to them. This can be supported by handouts about the local colleges, links to apprenticeship websites and local jobsites.

As a whole group, the progression opportunities can be listed on the board and the group can discuss what their initial ideas/plans are for the next stage.

**Suggested time:** about 1 hour.

### Skills audit

Learners identify their own skills using a number of different techniques. They could list their own ideas first and then use commercially designed paper-based or online questionnaires. Ideally, learners should have the chance to do both. They can then compare results.

Learners list their skills in order of confidence. If the group know each other well, they could share their list with others to find out their opinion.

**Suggested time:** about 3 hours.

### Appropriate behaviours for progression

Learners could begin the session by watching a video clip of people demonstrating different attitudes and behaviours. The group can then identify different attitudes and behaviours and talk about how they can affect other people's attitudes towards them.

Learners could role-play different scenarios that highlight the influence attitudes and behaviours can have on others, e.g. employers.

**Suggested time:** about 3 hours.

### Local sources of information to identify progression opportunities

In small groups, learners carry out local research to find out where and how they can find out about progression opportunities. They could research online local newspapers and magazines, visit the library or careers service, websites, advice and guidance etc. Learners can collate their information to share with others in the class.

**Suggested time:** about 3 hours.

### Opportunities to develop the skills and behaviours needed to progress

Tutors could invite speakers to talk about the value of volunteering and the skills that learners can develop, e.g. working in a charity shop, running a 5k and getting sponsors, being a youth leader, taking part in the Duke of Edinburgh's Award (DofE) scheme or sport's coach.

**Suggested time:** about 3 hours.

### Setting goals

Learners will find out how to set simple goals that are achievable. Tutors could begin by helping learners set day-to-day goals, e.g. what they are planning to do that evening. Initially learners only need to set clear, achievable goals, however it will be valuable to consider measures and timescales.

Tutors can provide a list of potential goals and learners have to decide if they are clear and achievable.

**Suggested time:** about 3 hours.

**Matching skills and behaviours to progression opportunities**

Tutors give a range of course details, job advertisements and job descriptions for learners to review. Learners can then match their skills to the relevant course or job. They could initially work in small groups to identify the information they need from the text. Following the matching exercise, they can then decide if it would be realistic to apply for the course or job, if they would need to develop other skills before they could apply or if the course or job is not appropriate.

**Suggested time:** about 3 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You have been asked to attend a progression interview with your tutor to discuss the next step in your learning. In preparation for this, you need to research the possible progression opportunities available to you. You should decide on one opportunity to focus on and produce an outline of the skills and behaviours needed for that particular progression goal and then match your own skills and behaviours to the goal. You should then produce a detailed progression plan, identifying the key areas you need to develop in order to meet your progression goal. Both of these documents will form a basis for the discussion with your tutor.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You will need to produce a new audit and progression plan for a different progression opportunity.

# Unit A3: Working with Others

Level: **1**

Unit type: **Core**

Guided learning hours: **30**

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## Unit in brief

Learners will develop skills in communication, teamwork and problem solving that will enable them to work effectively with other people on a given activity.

## Unit introduction

A key part of being successful in work and study is the ability to work with other people. This includes being able to communicate, working together to solve problems and working in teams to achieve common goals.

In this unit, you will develop these skills and demonstrate how you use them. You will work with others to complete a given activity, agree roles and responsibilities, share ideas and support each other. Problems may come up as you work on the activity and you will need to find solutions to them. It can be difficult working with others and this unit gives you the opportunity to develop the skills and behaviours you need to be successful.

The skills you learn in this unit can be applied throughout your sector units and in broader contexts.

## Learning aims

In this unit you will:

- A** Demonstrate the ability to work with others on a given activity
- B** Review own and others' performance on a given activity.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Demonstrate the ability to work with others on a given activity	<ul style="list-style-type: none"><li>• Communicating with others</li><li>• Working with others to achieve common goals</li><li>• Carrying out an outline review of own and others' performance</li></ul>	<ul style="list-style-type: none"><li>• A log/blog that provides evidence of:<ul style="list-style-type: none"><li>○ role in a set activity where they have worked with others</li><li>○ review of the activity.</li></ul></li><li>• Witness statement from tutor.</li></ul>
<b>B</b> Review own and others' performance on a given activity		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• This unit can be delivered in a sector context.</li></ul>	<ul style="list-style-type: none"><li>• Ways to communicate effectively through listening and talking</li><li>• Building effective teams</li><li>• Ways to assess own performance</li><li>• How to plan to improve own performance</li></ul>	<ul style="list-style-type: none"><li>• Verbal communication</li><li>• Teamwork</li><li>• Problem solving</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Make relevant and extended contributions to discussions, allowing for and responding to others' input.</li> <li>Make different kinds of contributions to discussions.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Communicating with others

- Taking part in discussions to decide ways to complete activity.
- Consideration of own verbal communication when working with others.
- Listening and responding appropriately to others.
- Contributing ideas and points of view.
- Accepting and giving positive and negative feedback.

#### Working with others to achieve common goals

- Identifying individual roles and responsibilities.
- Ensuring clear communication throughout the activity.
- Knowing appropriate behaviours for different situations.
- Working through problems and agreeing solutions together.
- Importance of respecting others who are working with you.
- Reviewing team and personal performance.
- Solving issues in teams.

#### Carrying out an outline review of own and others' performance

- Identifying own strengths in activity.
- Receiving feedback about own performance.
- Giving feedback to others on their performance.
- Outlining ways to improve own performance when working with others.

### Transferable skills

- Verbal communication: working with others.
- Teamwork: working with others to complete an activity or achieve a goal.
- Problem solving: working together to overcome problems.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Demonstrate the ability to work with others on a given activity</b>		
<b>A.P1</b> Demonstrate limited communication skills when working with others to complete a given activity.	<b>A.M1</b> Demonstrate appropriate communication skills when working with others to complete a given activity.	<b>A.D1</b> Demonstrate effective communication skills when working with others to complete a given activity.
<b>A.P2</b> Undertake an activity with others, taking some responsibility for own role within it.	<b>A.M2</b> Undertake an activity with others, taking responsibility for own role within it.	<b>A.D2</b> Undertake an activity with others, taking full responsibility for own role and making effective contributions.
<b>Learning aim B: Review own and others' performance on a given activity</b>		
<b>B.P3</b> Produce an outline review of own performance during an activity.	<b>B.M3</b> Review own performance during an activity, identifying own strengths and weaknesses, with reference to feedback.	<b>B.D3</b> Review own performance during an activity, making suggestions for the future, with detailed reference to feedback.
<b>B.P4</b> Deliver positive feedback to others that is relevant to the activity.	<b>B.M4</b> Deliver positive and negative feedback to others, using examples from the activity.	<b>B.D4</b> Deliver constructive feedback to others, using relevant examples from the activity.

## Essential information for tutors

Units from Group A and Group B may assess the same transferable skills. Where this occurs, you may opt to deliver these units simultaneously. This is acceptable providing the delivery is planned appropriately and that all learning aims for both types of unit are met and covered in the assessment. You are not permitted to deliver a unit and then use learners' evidence from the unit to achieve another unit.

## Essential information for assessment decisions

### For distinction standard, learners:

- work with others successfully, taking ownership of their role in the activity and completing all their own activities while supporting others to achieve the team goal. Their communication skills will be clear and they will be understood by other members of their group to drive the activity forward. They will listen and respond to others, showing respect for their views
- complete a detailed review of their own performance during the activity. This could be written or a verbal recording that gives a detailed overview of the activities they completed. They will describe how they would work with others in the future, using supported examples from feedback they received from others. They will also demonstrate the ability to give positive and negative feedback to their peers in a clear and helpful way, using full examples from the activity.

### For merit standard, learners:

- generally work well with others, taking responsibility for their own role in the activity and communicating with others when required, using appropriate language and demonstrating some ability to listen to the views of others
- complete a review of their own performance during the activity. This could be written or a verbal recording which identifies some of their strength and weaknesses, making some reference to the feedback they received from others. They will also demonstrate the ability to give some positive and negative feedback to their peers, using simple examples from the activity.

### For pass standard, learners:

- show some ability to work with others, taking some responsibility for their own role in a activity, but not necessarily seeing the activities through to the end. Their communication with others may be minimal and only when necessary
- complete an outline of the role they carried out during the activity. This could be written or a verbal review with minimal attempt to review their own performance. They will attempt to give positive feedback to their peers, although this may be very basic and not linked to concrete examples from the activity.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### What makes a good team?

Tutors ask for examples from the group of any good and effective teams they can think of. For example, it could be the local netball team, a dance group or a professional football club. Smaller groups then choose one example from the list and identify two traits that make the team work well together. Examples could be:

- communication
- working together to solve problems
- understanding each other's roles and responsibilities.

Each group has to decide on the two traits they want to feed back to the group. Tutors list them all and then highlight the most prominent. Tutors ask how easy it was to decide as a group on the two traits they had to feed back on.

The group then discuss their experiences of working with others in the past, reflecting on their behaviours and making suggestions on how their team could have worked better.

**Suggested time:** about 1 hour.

### What makes a bad team?

Tutors ask the group for examples of where they have seen or experienced bad teamwork, or of people not working well together. The group discuss the reasons why the team didn't work well together.

Tutors then show examples of bad teamwork, from TV shows like *The Apprentice* or *Big Brother*.

While the clips are being shown, the group write down everything they think has made the team not work properly. They then share their ideas with the whole group.

The whole group then reflects on the benefits of working well with other people and how they have to sometimes modify their behaviour to work effectively with other people.

**Suggested time:** about 1 hour.

### Working in pairs

Tutors hand out photographs of celebrities, well-known people and sports men and women to each person in the group. They are not allowed to tell anyone who their picture is of.

Tutors then put the group in pairs, outside of friendship groups if possible. Then taking turns, one person asks questions about their partner's picture and their partner can only answer 'yes' or 'no'. They are given a time limit to find out the identity of their partner's celebrity.

Once the activity has finished, the tutor asks the group to reflect on how easy it was to communicate with someone when you only get yes or no answers. The group then reflects on how you have to phrase your questions to get the most information and also how to do this quickly under a time limit.

The activity could be repeated in different pairs.

**Suggested time:** about 1 hour.

**Working with a group on an activity**

The workshop can focus on building effective teams. There are a range of appropriate activities that learners can participate in.

For example, learners:

- work in small groups to build a tower that can support a marble. They are given drinking straws, sticky tape and a marble. The team that creates the highest tower wins
- work together to create a structure from balloons that will take the weight of one person in the group.

This type of workshop is ideal for discussing roles and responsibilities, participation, communication skills and problem solving.

Tutors could use a team-building activity at the beginning of each workshop instead of having a whole session focusing on this skill.

**Suggested time:** about 2 hours.

**Communicating in teams**

Working in groups, learners follow instructions to create an end product.

Learners will need to:

- check they understand what they need to do
- decide who is doing which task
- check progress and follow advice
- ask for help, if necessary
- respect each other's ideas and opinions
- solve problems.

At the end of this session, the group can discuss how effectively they communicated with each other, how well they worked together as a team, any issues they had and how they solved problems.

**Suggested time:** about 5 hours.

**Relaying instructions to others**

Learners can take part in a number of activities to develop effective communication skills. For example working in pairs, learners prepare instructions for a simple task such as tying shoe laces. They then share this with another group of learners who then follow the instructions. If the instructions are clear, learners should be able to tie their shoes successfully.

**Suggested time:** about 1 hour.

**Debating a topic with others**

Tutors give learners a number of topics to discuss in small groups with some key questions.

The group has to firstly decide on the topic they want to discuss and decide on an 'observer' to observe and take notes on the groups' interactions. The group will then be given five minutes to discuss the topic and come to some agreement on the answers to the questions.

The group will decide on one person to feed back on the answers to the questions. The observer will then feed back on how the group interacted with each other and came to decisions.

The activity can be repeated with different people taking the 'observer' role.

The whole group then discuss what they have learned in this session about the views of others and the different roles that are taken in a group.

**Suggested time:** about 2 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You will work together (in pairs or larger groups) to put on a small fundraising activity at college for a charity day.

In your group you need to discuss and agree:

- the type of activity you will put on
- who you need permission from
- the date the activity will be on
- the resources needed to put on the activity.

You will agree the roles for each member of the group, ensuring that each of you has an equal amount of responsibility. You need to set up a log/blog explaining your role in the group and your key responsibilities. You need to keep this updated throughout the process.

Once the activity is completed your group will carry out a peer assessment of the activity, discussing how successful you were in working together to put on the activity, writing up the discussions in your log/blog and making suggestions for how you can improve your skills and behaviours.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You will work with a different group of people to produce a stand for the college open day.

# Unit A4: Researching a Topic

Level: **1**

Unit type: **Core**

Guided learning hours: **30**

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## Unit in brief

Learners will develop the skills needed to carry out some outline research into an agreed topic. They will keep a record of their investigation and then present a summary of their findings.

## Unit introduction

In this unit, you will have the opportunity to research a topic that interests you. It could be linked to something you have enjoyed in your sector, something that is happening in your local community or perhaps linked to what you would like to do in the future.

Before starting on your research you will need to decide on the focus for your topic. You will set up a research log to record the research tasks you carry out and the sources that you use.

When you have completed your research, you will summarise and present your findings.

You will use many of the skills you have developed already, such as planning, time management, research and presenting, as well as any sector skills and knowledge that you have learned.

All these skills are important for progressing to further qualifications.

## Learning aims

In this unit you will:

**A** Carry out research into an agreed topic

**B** Present a summary of research findings into an agreed topic.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Carry out research into an agreed topic	<ul style="list-style-type: none"><li>• Selecting a suitable topic</li><li>• Collecting information on topic</li><li>• Keeping a research log</li><li>• Presenting findings of research</li></ul>	<ul style="list-style-type: none"><li>• Research log.</li><li>• A summary of research findings.</li></ul>
<b>B</b> Present a summary of research findings into an agreed topic		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• The research topic can be in a sector context.</li></ul>	<ul style="list-style-type: none"><li>• Ways to plan successfully</li><li>• Identifying sources of information</li><li>• How to research</li><li>• Presentation methods</li></ul>	<ul style="list-style-type: none"><li>• Planning</li><li>• Finding out</li><li>• Managing information</li><li>• Communication</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>• Present information/points of view clearly and in appropriate language.</li> <li>• Present information in a logical sequence.</li> <li>• Use correct grammar, including correct and consistent use of tense.</li> <li>• Ensure written work includes generally accurate punctuation and spelling, and that meaning is clear.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Selecting a suitable topic

- Investigation could focus on the local community or area, linked to a sector, hobby or an extra-curricular activity.
- Agreeing investigation title and the scope of the research with tutor.
- Agreeing deadline.
- Ensuring topic is focused and manageable in the timescales.
- Identifying key actions and milestones for the investigation such as setting up a log, organising visits, deadline for completion.

#### Collecting information on topic

- Sources of information:
  - electronic media, e.g. blogs, podcasts, downloads, websites
  - printed media, e.g. newspapers/magazines/books
  - interviews
  - visits.
- Identifying and selecting the key points from research.

#### Keeping a research log

- Ongoing record of information researched.
- Information on research sources, methods and key findings.
- Ongoing record of information found out through a chosen medium such as a folder, blog, vlog (video blog).

#### Presenting findings of research

- Summarising key findings.
- Choosing presentation method, e.g. through a PowerPoint®, vlog, written handouts, oral questioning.
- Explaining findings in a clear and concise way.

### Transferable skills

- Planning: identifying key tasks to complete.
- Finding out: information from research sources.
- Managing information: selecting the relevant information, choosing appropriate sources of information.
- Communication: through presentation of findings.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Carry out research into an agreed topic</b>		
<b>A.P1</b> Search for information on an agreed topic using given research sources.	<b>A.M1</b> Search for information on an agreed topic using own and given sources.	<b>A.D1</b> Carry out a focused and detailed search into an agreed topic.
<b>A.P2</b> Select simple information from given sources on the agreed topic.	<b>A.M2</b> Select mostly relevant information from sources on the agreed topic.	<b>A.D2</b> Select relevant information from sources that link clearly to the agreed topic.
<b>Learning aim B: Present a summary of research findings into an agreed topic</b>		
<b>B.P3</b> Present an outline summary of research findings on an agreed topic.	<b>B.M3</b> Present a clear summary of research findings on an agreed topic, with reference to some of the research sources used.	<b>B.D3</b> Present a focused summary of research findings, with clear referencing to the research sources used.

## Essential information for tutors

Units from Group A and Group B may assess the same transferable skills. Where this occurs, you may opt to deliver these units simultaneously. This is acceptable providing the delivery is planned appropriately and that all learning aims for both types of unit are met and covered in the assessment. You are not permitted to deliver a unit and then use learners' evidence from the unit to achieve another unit.

## Essential information for assessment decisions

**For distinction standard**, learners:

- carry out research that remains focused on the agreed topic and uses a range of appropriate sources to collect information
- give a detailed breakdown of the sources they have used and select the most relevant information from them, demonstrating awareness of which sources were more reliable than others
- present their summary of research findings clearly, keeping the focus on the research topic. The summary will also reference in detail the research sources that were used.

**For merit standard**, learners:

- carry out research that remains mostly focused on the agreed topic but may become too broad in places. Some of the sources will have been given by tutors but some they have found for themselves
- outline the research sources used. They will select appropriate information for their topic. They will demonstrate some understanding of which sources are more reliable than others
- present their summary of research findings, remaining mostly focused on the agreed topic although may go off in other directions at some points. The summary will reference some of the research methods that were used.

**For pass standard**, learners:

- carry out basic research, using research sources that have been given by tutors
- produce a research log that gives incomplete information of the key tasks they have completed. They will select only simple and obvious information from the given sources
- present a basic summary of research findings that are mainly broad and unfocused. There will be little or no reference to the research methods used.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Choosing a topic to investigate

This is perhaps the hardest part of any project. Learners need to choose a topic that is interesting to them but not too big so that it becomes impossible to complete. In small groups, learners make a list of subjects or hobbies they are interested in. They can then ask each other questions about the topics or hobbies. This could begin to form a list of possible subjects for each project.

Alternatively, tutors could provide a list of potential topics for learners to choose from.

**Suggested time:** about 3 hours.

### Deciding on outcomes

Learners can be given a list of outcomes and project titles. Their task will be to match the outcomes with the titles. They can then look at the results with other group members to see if they agree or have different answers. Tutors may want to include answers that will overlap with different topics.

**Suggested time:** about 3 hours.

### Research sources

Tutors do a brief overview of what the difference is between a primary source and a secondary source. Tutors then give out a list of different research sources and learners work in pairs to decide whether it is primary or secondary. Learners feed back on their decisions.

**Suggested time:** about 2 hours.

### Identifying the tasks that need to be completed

Learners plan a task list of the activities they need to complete. Tutors could produce a list of actions needed to complete a project in the wrong order and then, in groups, learners put them in the correct order. They will use the correct list to produce a to-do list of tasks to complete for their investigation.

**Suggested time:** about 3 hours.

### Reviewing progress so far

As a group, learners will begin the session by reviewing what they have done so far. This should be a short presentation, depending on the number in the group. This activity is not intended to use the full time for the workshop. Learners can identify any problems they have had and how they have solved them, if they have. Other learners have the opportunity to ask questions about the project and share ideas.

Learners could record the review in their log.

**Suggested time:** about 3 hours.

### What skills are you using?

This workshop will focus on the skills learners are using to carry out their project. Working in small groups, learners could identify different communication, planning, time-management and problem-solving skills. They can then share their results with the larger group.

**Suggested time:** about 3 hours.

**How to present outcomes**

Learners will investigate ways to present their research findings. They could experiment with vlogs or blogging software, and try out PowerPoint or Prezi.

They could also try using graphs, charts or illustrations to present information. Learners could work in small groups to decide which formats would be most appropriate for different topics.

**Suggested time:** about 3 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You need to select a topic of your choice to carry out some research into. The topic could be an extension of something you have studied on your course or an interest or hobby that you would like to find out more about. You will discuss your ideas with your tutor and then come up with a title for your research. This should be focused and manageable in the time available to complete it. You will set up a research log to record what you are doing. This could be a folder, a blog or vlog. You will produce a to-do list of the tasks you need to complete in the timeframes given to you. While you carry out your research, you will keep an ongoing record of the sources and methods used to find out information. Finally you will summarise your key findings in a presentation method of your choice, making reference to the research sources you used.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You will need to select a different topic for your research.

# Unit B5: Finding Out About Businesses in Your Area

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will find out and present information about businesses in their area.

## Unit introduction

Every day people buy products and services provided by businesses, for example you will go to the local supermarket if you want to buy groceries or new clothes. There are also many services that are provided, including solicitors that give legal advice and plumbers who repair plumbing problems at your home.

In this unit, you will find out about different businesses in your area and what purpose they serve. You will use your skills to select information and present what you have found out to others.

This unit will give you the sector knowledge you need to progress to Level 2, as well as skills in searching for, selecting and presenting information. The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Find out about different businesses in your area and how they meet customer needs
- B** Produce a document about businesses in your area for a given purpose.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Find out about different businesses in your area and how they meet customer needs	<ul style="list-style-type: none"><li>• Types and purposes of businesses</li><li>• Types of customer needs</li></ul>	<ul style="list-style-type: none"><li>• Notes that cover the research carried out.</li><li>• Presentation, could be using presentation software or a leaflet.</li></ul>
<b>B</b> Produce a document about businesses in your area for a given purpose		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Searching for information about businesses</li><li>• Reading to identify information about local businesses</li><li>• Presenting information about different local businesses</li></ul>	<ul style="list-style-type: none"><li>• Sources of information</li><li>• Types of secondary sources</li><li>• Ensuring sources are valid</li><li>• Presentation formats</li></ul>	<ul style="list-style-type: none"><li>• Finding out information</li><li>• Managing information</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Present information/points of view clearly and in appropriate language.</li> <li>Read and utilise information contained in texts.</li> <li>Write clearly and coherently, including an appropriate level of detail.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Types and purposes of businesses

- Retail businesses selling products or food, including:
  - supermarkets
  - corner shops
  - clothing stores
  - stationery shops
  - charity shops
  - coffee shops
  - book shops.
- Service businesses selling a service, including:
  - hairdressers
  - beauty salons
  - electricians
  - plumbers
  - transport, e.g. bus, rail, taxi
  - medical, e.g. doctors, dentists
  - non-profit organisations, e.g. sports clubs
  - libraries.
- Service businesses with an administrative focus, including:
  - accountants
  - solicitors
  - marketing businesses.
- Retail and service businesses, including:
  - a large retail store that offers photocopying service and a shoe repair service
  - a hairdresser selling hair products
  - charities or non-profit organisations often sell second-hand clothing and provide a social service to someone who is ill, e.g. a hospice.
- Public services, including:
  - education organisations, e.g. schools, colleges
  - services provided by the local councils such as road maintenance and waste removal.

#### Types of customer needs

- Customers want value for money, convenience and quality of products/services. They might also want to consider the environment by using recyclable products.

### Transferable skills

- Finding out information: from sources such as newspapers, local yellow pages, books, leaflets and web-based research, preparing questions for interview, skills in searching for information, including internet searches, using websites, downloadable resources, collecting leaflets and using content pages.
- Managing information: organising information in a clear, logical manner, including the selected businesses and their purpose by producing either leaflets, an email or using presentation software, selecting information, including reading skills, identifying key points, making notes, summarising key points such as purpose of the business.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Find out about different businesses in your area and how they meet customer needs</b>		
<b>A.P1</b> Select information about businesses in your area and how they meet some customer needs.	<b>A.M1</b> Select information about businesses in your area and how they meet most of customer needs.	<b>A.D1</b> Select information about different businesses in your area and how they meet all the customer needs.
<b>Learning aim B: Produce a document about businesses in your area for a given purpose</b>		
<b>B.P2</b> Produce a document with information about businesses in your area that meet some of the needs of people in a given scenario.	<b>B.M2</b> Produce a detailed document with information about businesses that meet most of the needs of people in a given scenario.	<b>B.D2</b> Produce a detailed and well-organised document with information about businesses that explains why they will meet all the needs of people in a given scenario.

## Essential information for tutors

### Essential information for assessment decisions

**For distinction standard**, learners:

- search for and select relevant and accurate information to meet all the customer needs in the scenario, using own sources and sources given by tutors. They will include details of the sources used, e.g. websites, books, and details of methods used to search for information such as internet searches. This could be written evidence, such as notes or a completed pro forma, or verbal such as a recorded discussion with tutors
- produce a document that shows the information organised in an appropriate, clear and logical format. It will explain the information about businesses in their area and show details of clear links between the chosen services and the needs they meet, e.g. a brochure, poster
- produce the document using mostly compound sentences and it will be mostly grammatically correct.

**For merit standard**, learners:

- search for and select relevant and accurate information to meet the main customer needs in the scenario, although some more minor needs may be omitted. They will use different sources given by tutors, naming the sources used and stating how they used them to search for the information. Evidence of searches can be recorded in writing, e.g. on a pro forma, or through a question and answer session with tutors
- produce a document that shows the information organised in a clear way, showing links between the businesses in their area and the customer needs they meet
- produce the document using some compound sentences and it will have few grammatical errors.

**For pass standard**, learners:

- search for and select information about businesses in their area from a choice of sources given by tutors, and may use only one source. Information selected should meet at least two needs in the scenario. They will need to name the source and why they chose it
- produce a simple document, which could be a word processed list, and give information about some businesses in their area that could meet at least two customer needs given in the scenario. Other needs may be omitted, or not all information presented may be relevant, or links between the services and the customer's needs may not be clear
- produce the document with some grammatical errors.

### Essential resources

For this unit, learners must have access to information about different businesses in the local area.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Tutor-led discussion on what business is. Tutors ask the question, 'What is the difference between retail and service businesses?' Learners brainstorm different businesses in their local area and put them into categories, either retail or service businesses or a combination of both.

**Suggested time:** about 2 hours.

### Activity: What are customer needs?

In groups, learners brainstorm the kind of needs they have, for example buying a product or using a service, and put their needs into the types of business categories. Learners use the information they gathered in the previous session to identify the businesses in their local area that will meet these needs and document them. Tutors to highlight that customers' needs include value for money, convenience and quality of products or services.

**Suggested time:** about 6 hours.

### Activity: Visit to setting

Learners visit the high street in their local town to observe the businesses available for specific purposes.

On return to the centre, learners categorise the types of businesses and their purposes.

Using the internet, learners find out about other local retail and service businesses in their area and their purposes.

**Suggested time:** about 8 hours.

### Activity: Finding out about businesses in the local area

Tutor-led discussion about different types of research skills. What do learners do when they need to find something out? In groups, learners search the internet about things they are interested in. Tutor-led discussion about how to ensure that websites are up to date and how to safeguard own internet activity.

In groups, learners research different retail and service businesses using internet sites for a particular purpose, for example services provided by the local supermarket as opposed to a different supermarket in the area. Each group presents their findings to the other learners.

A guest speaker from a local retailer and/or service business talks to learners about what they offer.

**Suggested time:** about 10 hours.

### Activity: Skills for representing information

In groups, learners look at examples of how businesses represent themselves, for example websites, advertisements and leaflets, and then feed back to the other groups. The groups vote on which method of presentation is clearest.

Learners look at different representations of information from businesses, for example websites, brochures, posters. How clear was it? Did it get the message across?

Learners work individually to produce a document representing a given business in the form of posters, brochures.

**Suggested time:** about 8 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You have been given a case study scenario about a family from South Africa that have recently moved to your area. You will need to find out about and present information on businesses available to meet their needs.

The family includes:

- a mother who wants to know who to telephone to repair the boiler. She needs it to be as cheap as possible but be a reputable business
- her teenage daughter who wants to know where the local beauty salons are and those that have a nail bar
- her husband who wants to know which is the good quality supermarket that is not too expensive. He also wants a supermarket that sells good quality clothing
- the grandfather who the family cares for, suffers with low mobility and needs to socialise with people of his own age
- her teenage son wants to get work experience in a local IT business.

You will need to carry out some research into the businesses available in their area. This could take place either in class using, for example information leaflets and internet searches or by visiting the high street in the local town. You will select relevant information about suitable retail and service businesses and prepare a document in a suitable format, clearly showing how the services will meet the needs of the different family members.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You will need to find out about and prepare a document showing how the information meets the needs of a different group of people. For example a family with small children.



# Unit B6: Organising a Meeting

Level: **1**

Unit type: **Sector (Business)**

Guided learning Hours: **40**

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## Unit in brief

Learners will develop the skills to organise a meeting and record the outcomes from it.

## Unit introduction

Getting people together for a meeting is a major part of the day for most businesses. It is important that meetings are well organised to ensure that the people attending know what the meeting is about, as well as where it will be held and the date and time.

In this unit, you will learn what is needed to organise a meeting. You will be given a meeting to organise, setting a date and time and putting together an agenda of the key points that will be discussed. You will invite people to attend by sending out invitations. You will sit in on the meeting and take a record of it.

By completing these tasks you will develop key transferable skills such as planning and managing information. The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Prepare documentation and communicate information when organising a meeting
- B** Produce a record of a meeting.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Prepare documentation and communicate information when organising a meeting	<ul style="list-style-type: none"><li>• Purposes of meetings</li><li>• Process to organise a meeting</li><li>• Documents and skills used to invite attendees to a formal meeting</li></ul>	<ul style="list-style-type: none"><li>• Printouts of completed documents.</li><li>• Screenshot of email or electronic calendar invitation.</li><li>• Record of a meeting.</li></ul>
<b>B</b> Produce a record of a meeting		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Creating accurate documents</li><li>• Communicating with others</li></ul>	<ul style="list-style-type: none"><li>• Organising a meeting, taking into account the processes</li><li>• Types of meeting documents</li></ul>	<ul style="list-style-type: none"><li>• Communication</li><li>• Managing information</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Present information/points of view clearly and in an appropriate way.</li> <li>Use language, format and structure suitable for purpose and audience.</li> <li>Ensure written work includes generally accurate punctuation and spelling, and that meaning is clear.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Purposes of meetings

- Meetings take place for different purposes, including:
  - information sharing, e.g. team meetings, briefings, staff meetings
  - planning what needs to be done, e.g. a project that needs completing
  - decision making, where decisions are made to be carried out by invitees
  - problem solving if a problem has arisen.
- Meetings can be planned or called as 'emergency' meetings to deal with issues that need addressing.

#### Process to organise a meeting

- Sending out a notice of meeting that covers the date, time, venue and purpose of the meeting and an agenda to invitees, including meeting title, date, time, venue, as well as points to be discussed.
- Booking and confirming venue for a set time and date.
- Checking the attendance from the RSVPs of attendees.
- Sending out reminders to attendees.

#### Documents and skills used to invite attendees to a formal meeting

- Notice of meeting either embedded into an email or electronic calendar invitation or attached.
- Agenda attached to either the email or electronic calendar invitation. Document used to capture a record of the meeting.
- Active listening for meaning by paying attention and establishing the meaning of what is being said and by asking questions to ensure understanding.
- Note taking – capture key information and decisions of the meeting.
- Collate the notes into minutes of meeting to go out post meeting, to include meeting title, date, time, venue as well as numbered items, to include attendance, apologies, matters arising and items that were discussed.

### Transferable skills

- Communication: communicate in a variety of ways through written invitations, notice of meeting, agenda and listening and capturing minutes in written form.
- Managing information: creating and sending notice of meeting and agenda to attendees from instructions given and taking the minutes of the meeting.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Prepare documentation and communicate information when organising a meeting</b>		
<b>A.P1</b> Produce documentation with outline information when organising a meeting.	<b>A.M1</b> Produce documentation with most of the required information when organising a meeting.	<b>A.D1</b> Produce documentation with the required information when organising a formal meeting.
<b>A.P2</b> Demonstrate some written communication skills when preparing documentation for a meeting.	<b>A.M2</b> Demonstrate adequate written communication skills when preparing documentation for a meeting.	<b>A.D2</b> Demonstrate mostly accurate written communication skills when preparing documentation for a meeting.
<b>Learning aim B: Produce a record of a meeting</b>		
<b>B.P3</b> Produce an outline record of a meeting.	<b>B.M3</b> Produce a detailed record of a meeting.	<b>B.D3</b> Produce a detailed and mostly accurate record of a meeting.

## Essential information for tutors

### Essential information for assessment decisions

#### **For distinction standard**, learners:

- produce a well-structured, logical invitation/notice of meeting that conveys clear meaning to the invitees and includes the purpose of the meeting, venue, the time and date, as well as a request for dietary requirements of the attendees
- produce a mostly accurate agenda that is formatted logically and clearly and includes attendance, apologies, matters arising and all points to be discussed. It is not merely a list but has numbered items
- produce mostly accurate notes of the meeting, formatted logically with item numbering of attendance, apologies and all the key decisions captured
- demonstrate written communication skills that are grammatically correct with very few spelling errors.

#### **For merit standard**, learners:

- produce a fit for purpose, clear invitation/notice of meeting that includes the purpose of the meeting, venue, time and date
- produce an agenda that is clearly formatted with numbered and ordered items and includes attendance, apologies, matters arising and points to be discussed
- produce detailed notes of the meeting that are formatted logically with numbered items and include attendance, apologies and most of the key decisions
- demonstrate written communication that is mostly grammatically correct with a few spelling errors.

#### **For pass standard**, learners:

- produce an invitation/notice of meeting that contains basic information for the meeting such as venue, time and date
- produce an outline agenda that may be simply a list of items to be discussed without numbering and order
- produce outline notes of the meeting that capture attendance, apologies and some of the key decisions
- demonstrate limited written communication skills that show grammatical and spelling errors.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Learners create a mind map of different types of meetings and discuss the different purposes of them. They work in pairs to write meeting titles based on the purpose of the meeting.

**Suggested time:** about 2 hours.

### Activity: Inviting attendees to meetings

Tutors give a presentation on how to invite people to attend a meeting, for example emails or electronic calendar invitations with all the essential points to include in the notice of meeting, either embedded in the electronic communication or as a separate document. Learners practise writing up a notice of meeting as separate documents and then as embedded documents in both email and electronic calendar invitations.

**Suggested time:** about 8 hours.

### Activity: Agenda

Tutors discuss with learners what an agenda is used for and why it should be sent to attendees before the meeting takes place. In groups, learners create mind maps on what should be included: venue, date, time and place, points to discuss and date of next meeting and why these are important.

Learners practise composing agendas in the correct format, including meeting title, date, time, venue and numbered items – attendance, apologies, matters arising, items for discussion and date of next meeting.

**Suggested time:** about 6 hours.

### Activity: Organising a meeting

In groups, learners organise a meeting for five attendees, as a role play, addressing all the relevant factors and sending out invitations. Learners send out notice of meeting and agenda to the attendees. They then send an email to book a venue to their tutor. They send out reminders to the attendees for the meeting.

**Suggested time:** about 8 hours.

### Activity: Recording minutes of meeting

Listening skills activities could be played such as a game of telephone where learners are put into a circle and one person whispers a sentence to the person next to them who passes it onto the next person and so on. At the end of the game, learners observe how the sentence has changed and discuss the importance of listening.

Discussion of selective listening.

Discuss with learners how to capture and format minutes of a meeting. Learners practise taking minutes and setting out documents in the correct format.

**Suggested time:** about 10 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You are asked by your manager to set up a meeting of the student union to be held in the union meeting room at the college on 20 December 2016 at 14.00. You are to invite five attendees (names and email addresses provided) and must send out all the required documentation. You will also need to make a record of a meeting.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

Your manager has asked you to set up a meeting for the student class representatives to be held in the common room of the 4th floor Harvey Building at the organisation on 15 November 2016 at 12.00. You are to invite five attendees (names and email addresses provided) and must send out all the required documentation. You will also need to make a record of a meeting.



# Unit B7: Branding a Product

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will produce a brand logo and a strapline for a product for a target market.

## Unit introduction

Branding is one of the most important aspects of any business, large or small. An effective brand gives a product a big advantage in a market that has many similar products. What exactly does branding mean and how can you successfully brand a product? Branding is all about the name, strapline and logo, which is a picture to help customers (target market) recognise the products. Think about Coca-Cola® as a brand. When you see the word Coca-Cola, even without actually reading the word, you know it is them because of the style of writing in the logo and the colour. Branding tells the target market what they can expect from the products and services, and it makes the products stand out from competitors' products. Businesses use branding on their websites, on packaging and in advertising.

In this unit, you will look at well-known brands and what makes them successful in terms of colour and style. You will then be given a product to brand by creating a logo and strapline.

The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Create a brand logo and strapline for a product for a target market
- B** Present a brand logo and strapline for a product to an audience.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Create a brand logo and strapline for a product for a target market	<ul style="list-style-type: none"><li>• Definitions of branding, logo and strapline</li><li>• Consideration of target market when creating a logo and strapline for a product</li><li>• Consideration of design when creating a logo and strapline for a product</li><li>• Presenting a brand to an audience</li></ul>	<ul style="list-style-type: none"><li>• Strapline.</li><li>• Logo.</li><li>• Presentation.</li></ul>
<b>B</b> Present a brand logo and strapline for a product to an audience		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Finding out about customers (target market)</li><li>• Finding out about products</li><li>• Branding methods and techniques</li><li>• Branding a product</li></ul>	<ul style="list-style-type: none"><li>• Target market</li><li>• Product knowledge</li><li>• Brand identity using style and colour</li><li>• Strapline</li></ul>	<ul style="list-style-type: none"><li>• Finding out</li><li>• Communication</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Contribute to discussions, allowing for and responding to others' input.</li> <li>Present information in a logical sequence using correct grammar.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Definitions of branding, logo and strapline

- A brand is a distinguishing symbol, mark, logo, name, word, sentence or a combination of them that companies use to distinguish their product from others in the market.
- A logo is a recognisable and distinctive graphic design, stylised name, unique symbol, or other device for identifying an organisation.
- A strapline is a short, easily remembered phrase used by an organisation so that people will recognise it or its products.
- Reason for branding: 'big idea' that lies at the heart of the business, the values that the product portrays.
- The features of the brand that makes the product stand out, what the brand offers, what makes the brand different.
- Importance/significance of branding: effective branding, uniqueness, character and promise.

#### Consideration of target market when creating a logo and strapline for a product

- Appealing to the target market by capturing their attention through images, colour, words and font.
- Target market characteristics in terms of race, age, disability and environment.
- Target market wants, needs and expectations to help decide on a suitable and effective logo and strapline.
- Templates and brand standards for promoting the product brand to target markets.

#### Consideration of design when creating a logo and strapline for a product

- Captivating strapline using expressive language.
- Features of a logo: colour, shape, design make it stand out from competitors and specific to the target market, e.g. for toys for children the logo should have bright colours and a design that will attract children.

#### Presenting a brand to an audience

- Presenting a brand using presentation software and speaker notes.
- Organising the slides for the presentation in a logical order to illustrate what has been considered in its development.

### Transferable skills

- Finding out: about a product (including existing similar products and branding) and about target market needs and wants.
- Communication: factors considered and features used in a presentation to an audience as well as the use of expressive language to create a captivating strapline.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Create a brand logo and strapline for a product for a target market</b>		
<b>A.P1</b> Develop a basic brand logo and strapline for a product that shows some consideration of design features.	<b>A.M1</b> Develop an appropriate brand logo and strapline for a product that considers most of the features of design.	<b>A.D1</b> Develop a creative brand logo and strapline for a product that considers most of the features of design.
<b>A.P2</b> Show limited consideration of the target market when developing a brand logo and strapline for a product.	<b>A.M2</b> Show some consideration of the target market when developing a brand logo and strapline for a product.	<b>A.D2</b> Show consideration of the target market when developing a brand logo and strapline for a product.
<b>Learning aim B: Present a brand logo and strapline for a product to an audience</b>		
<b>B.P3</b> Present a brand logo and strapline to an audience.	<b>B.M3</b> Present a brand logo and strapline to an audience, identifying some of the reasons for choice of the features used.	<b>B.D3</b> Present a brand logo and strapline to an audience, describing the reasons for the choice of features used.

## Essential information for tutors

### Essential information for assessment decisions

#### **For distinction standard**, learners:

- produce an innovative brand logo and strapline for a product that demonstrates consideration of most of the design features such as colours, design of the logo and wording of the strapline
- present a brand logo and strapline for a product to an audience, explaining in detail the reasons for their choice of features used to appeal to the product's target market
- use varied examples of effective communication when presenting the product's brand logo and strapline to an audience. The verbal presentation is well structured, using expressive language and flows naturally with little hesitation. Speaker notes and annotations on the presentation slides clearly convey the message. Learners use their speaker notes as prompts without interrupting the flow of their presentation.

#### **For merit standard**, learners:

- produce a suitable brand logo and expressive strapline for a product, using most of the features of design and showing some consideration of the target market
- present a brand logo and strapline for a product to an audience, explaining in some detail the reasons for the choice of features used to appeal to the product's target market
- use clear communication when presenting the product's brand logo and strapline to an audience. The presentation flows with some hesitation in places. Speaker notes and annotations on the presentation slides cover some of the message being conveyed. Learners use their speaker notes as prompts and do not read from notes constantly.

#### **For pass standard**, learners:

- produce a simple brand logo and strapline for a product that uses a few design features and shows minimal consideration of the target audience
- present a brand logo and strapline for a product to an audience, outlining the features used to appeal to the product's target market
- complete a presentation to an audience, with accompanying speaker notes and an outline summary of what is said. It will be presented with a number of hesitations and pauses while learners read from their speaker notes. Speaker notes and annotations on the presentation slides are in the form of an outline summary of what is being said.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Tutors give the definition of branding and lead learners to explore different brands, logos and straplines, for example the arrow in Amazon® points from the A to the Z, and so can be seen as being able to supply anything from A to Z.

Learners explore the branding of their place of education, for example college/school logo.

Learners explore how branding makes a product or concept stand out from competitors.

Virgin® as a concept across different commodities, for example Virgin mobile phones through to air transport.

**Suggested time:** about 2 hours.

### Activity: Consideration of the target market

Learners explore different target markets for different products, for example age, race, disability. They explore basic needs and wants of different target markets, for example teenagers, working adults, housewives.

Tutors guide learners to different products to identify different target markets, for example Toys “R” Us® and what its logo and straplines lead customers to expect.

**Suggested time:** about 2 hours.

### Activity: Features of branding for promoting products

In pairs or groups, learners explore how branding impacts on advertising to gain particular market share. For example, learners could source different types of advertisement footage, such as mobile phones, games consoles, make-up and clothing for teenagers, or iPad, cars and motorcycles for adults, or food and household products for housewives. The message that the brand gives out and why this is effective, for example high price – high quality, low price – high quality, low price – low quality.

**Suggested time:** about 4 hours.

### Activity: Logo design and straplines

Learners explore the factors to consider when deciding on colour and design of logos and the impression they give to the target audience, for example Xbox® – green with a picture of a control button, PlayStation® – white with a distinctive design, Tesco® – red and blue (Britishness), Coca-Cola – red and white with a distinguishing design, Virgin (Britishness).

Learners work individually, in pairs or in groups to explore the logo for their place of education, discussing the use of colour and design and how this distinguishes it from other places of education. In groups, learners design a new logo for their place of education.

Learners explore straplines of different products and, in groups, produce an expressive strapline for their place of learning which captures the essence of the place.

**Suggested time:** about 10 hours.

### Activity: Plan and design (group work)

In groups, learners plan and design a simple logo and strapline for a product or concept for a specific target audience, for example a new game, toy, washing powder or a new concept.

Working in groups, learners provide a sheet containing their plan and design for the branded product. It includes the factors they have considered when coming up with the branding design.

**Suggested time:** about 10 hours.

**Activity: Produce a brand for a product (group work)**

Working in groups, learners present their brand, citing reasons for their choice of design for the logo and choice of strapline.

**Suggested time:** about 8 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You are asked by the manager of a new business to design a brand for a new product, a pen that writes on paper and the writing is then captured by laser and displayed on a PC screen.

You need to carry out some research into similar products and branding on the market as well as who the product is targeted at. You are expected to create a brand with a logo and strapline for the product and present this, with reasons for your choices, to the business's management.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

Your manager has another new product that needs to be branded. This is a bendable outlet strip (plug and USB) extension cord for electrical and charging of appliances such as mobile phones and tablets.

# Unit B8: Creating a Visual Display

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will develop the skills needed to create a visual display for specific customers to promote products and increase sales.

## Unit introduction

Each time you go shopping you will see visual displays, both in the windows and inside stores, which are designed to attract customers. You will have seen mannequins wearing the latest fashions and visual displays of handbags and jewellery, kitchen goods, perfume, sporting goods, computer games, the latest mobile phone handsets – the list is endless. A customer's first impression is said to be made in the first five seconds of shopping and so creating attractive, well-arranged visual displays really helps to make that first impression – not just good but great. There is an art to setting out visual displays in ways that customers will find interesting and that will increase sales.

In this unit, you will create a visual display. You will consider health and safety and creative factors. You will create an attractive visual display that is appropriate for the space available using colour, light, space, product information and perhaps even smell, touch and sound.

This unit will give you the opportunity to demonstrate some of the practical skills used to tempt customers into stores. The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Plan a visual display for a product to attract target customers
- B** Create a visual display for a product to attract target customers.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Plan a visual display for a product to attract target customers	<ul style="list-style-type: none"><li>• What is a visual display?</li><li>• Factors to consider when creating a suitable visual display</li><li>• Visual display tools and techniques</li></ul>	<ul style="list-style-type: none"><li>• Plan of visual display.</li><li>• Final visual display.</li></ul>
<b>B</b> Create a visual display for a product to attract target customers		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Planning</li><li>• Knowledge of products</li><li>• Knowledge of targeted customers</li><li>• Presentation of products for visual display</li><li>• Health and safety rules</li></ul>	<ul style="list-style-type: none"><li>• Factors to consider</li><li>• Health and safety requirements</li><li>• Visual display techniques</li></ul>	<ul style="list-style-type: none"><li>• Planning</li><li>• Managing information</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>• Make relevant and extended contribution to discussions, allowing for and responding to others' input.</li> <li>• Prepare for and contribute to the formal discussion of ideas and opinions.</li> <li>• Make different kinds of contributions to discussions.</li> </ul>
<b>Mathematics</b>	<ul style="list-style-type: none"> <li>• Solve problems requiring calculation with common measures, including money, time, length, weight, capacity and temperature.</li> </ul>



## Unit content

### Knowledge and sector skills

#### What is a visual display?

- A visual display is how you display products for sale. Products are displayed in such a way that they draw attention by the design of the visual display and where it is placed in the store.

#### Factors to consider when creating a suitable visual display

- Type of product, e.g. cereals, perfumes and what their unique selling points are.
- Target customers include housewives, children, teenagers, gender specific depending on the product being displayed.
- Location of the visual display, e.g. department stores, discount stores, not-for-profit businesses, seasonal stores.
- Placement of the visual display, e.g. in a window, on an aisle end, near stairs, at store entrance, near escalators/lifts, in high-traffic aisles.
- Planning for the visual display, e.g. size and type of products, measuring space available, checking height and weight restrictions, creating a floor plan, planograms, calculating volume of products needed, props needed.
- Preparing for the visual display, e.g. preparing the visual display area, gathering stock, equipment and props together, following health and safety procedures, solving potential problems.

#### Visual display tools and techniques

- Presentation of the visual display uses a number of tools and techniques:
  - themes, stories, complementary colours, contrasting colours, branding, shapes
  - props, e.g. mannequins, busts, jewellery forms, mirrors, flowers, plants, easels
  - fixtures, e.g. gondolas, end caps, garment rails, slat walls, counters, shelves, platforms, showcases
  - free-standing visual displays, e.g. stacks, islands
  - signage, e.g. price, sizes of signs.
- Presenting visual display using presentation software and speaker notes.
- Organising the slides for the presentation in a logical order to illustrate what has been considered in its development.

### Transferable skills

- Planning: finding out about similar visual displays for a target audience, considering the tools and techniques used to inform the design and creation of a display in order to plan for own visual display.
- Managing information: using information about a product and target customers to inform the design and creation of a display.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Plan a visual display for a product to attract target customers</b>		
<b>A.P1</b> Plan to create a visual display to attract target customers, outlining the factors considered and tools and techniques used.	<b>A.M1</b> Plan to create a visual display to attract target customers, describing the factors considered and tools and techniques used.	<b>A.D1</b> Plan to create a visual display to attract target customers, explaining in detail the factors considered and reasons for tools and techniques used.
<b>Learning aim B: Create a visual display for a product to attract target customers</b>		
<b>B.P2</b> Create a simple visual display of a product to attract target customers.	<b>B.M2</b> Create an effective visual display of a product to attract target customers.	<b>B.D2</b> Create a creative visual display of a product to attract target customers.

## Essential information for tutors

### Essential information for assessment decisions

**For distinction standard**, learners:

- produce a plan to create a visual display to attract target customers, explaining in detail how and why the factors were considered in planning and why the tools and techniques are to be used
- create a fit-for-purpose, well-structured and innovative visual display of a product for target customers. The visual display will be of a high quality and convincing in design, using most of the appropriate props, fixtures, signage, themes, shapes and colour available to them. It will be aesthetically pleasing to the eye and creative in design.

**For merit standard**, learners:

- produce a plan to create a visual display to attract target customers, detailing the factors considered in planning and describing tools and techniques used. The plan will contain a few grammatical errors
- create a fit-for-purpose visual display of a product for target customers. The visual display will be convincing in design, using most of the props, fixtures, signage, themes, shapes and colour available to them, that would suitably attract the target customers.

**For pass standard**, learners:

- produce a plan to create a visual display to attract target customers that summarises at least three factors that were considered in planning and lists the tools and techniques used. The plan could contain some grammatical errors
- create a plain and very elementary visual display of a product for target customers. The visual display will be simple in design, using minimal props, fixtures, signage, themes, shapes and colour to attract the target customers.

### Essential resources

For this unit, learners will need access to:

- equipment, e.g. scissors, double-sided tape, pins, tape measure, cutting knife, pencils, marker pens, board and card, nylon display thread, Velcro®, glue gun
- fixtures, e.g. gondolas, end caps, garment rails, slat walls, counters, shelves, platforms, showcases, display crates, podiums
- props, e.g. mannequins, busts, jewellery forms, mirrors, artificial flowers and display plants, easels, chalk boards, display fabrics.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Tutors show examples of different visual displays and discuss who creates them. Learners discuss the purpose of visual displays, why businesses use them and where they are found.

**Suggested time:** about 5 hours.

### Activity: Researching visual displays

In pairs, learners research examples of visual displays. Learners may visit research displays in their local area. Learners use their research to create a short PowerPoint® presentation for the group, showing different types of visual displays. This will lead to class discussion about different types of visual displays. Discussions could include who the display is aimed at, location of the display and the sort of product being displayed.

**Suggested time:** about 6 hours.

### Activity: Planning a display

Tutors show learners examples of floor plans and planograms and lead a discussion around factors that need to be considered and problems learners may encounter when planning a visual display, for example:

- placement – in a window, on an aisle end, near stairs, at store entrance, near escalators/lifts, in high traffic aisles
- safety issues – not blocking a fire exit
- accessibility – not blocking windows or doors
- amount of space available
- flow of customers
- type of product and display
- use of fixtures and props
- lighting
- security of stock – concerns about theft
- health and safety, e.g. height and weight.

Show learners some real visual displays in stores, and ask them to sketch out a plan for a chosen display.

**Suggested time:** about 6 hours.

### Activity: Researching a visual display

Learners research a variety of different displays to inform a presentation, showing examples of displays they think are good and some they think are bad, with reasons.

In groups, learners source different display types, collate their findings and create a presentation that shows a variety of different displays, both good and bad using, e.g. themes, stories, complementary and contrasting colours, branding, signage, shapes, props, fixtures, free-standing displays. Learners deliver their presentation to the class and then discuss what they have seen. What sort of display did they like/dislike? What worked well/didn't work?

**Suggested time:** about 4 hours.

**Activity: Preparing a visual display**

Tutors give learners a design brief. In small groups, learners plan and prepare a visual display for the given brief. Learners consider factors such as the product being displayed, the target customer, retail outlet and location.

As a class, learners discuss the final display, how it meets the given brief and how it would help entice sales. The discussion should include explanations of choices made.

**Suggested time:** about 4 hours.

**Activity: Thinking about safety**

Learners think about safety considerations for displays, for example why its height and stability might be important.

Learners think about their own safety, for example what tools and equipment to use, how to keep themselves and others safe, procedures to follow in case of an accident.

Learners draw up a checklist that could be used to ensure safety.

**Suggested time:** about 4 hours.

**Activity: Creating a visual display**

Give learners a brief, for example a window display in the local charity shop. Learners think about a display they could create and draft a plan to show to the class. Learners share their plans and discuss the pros and cons of each. Would they work? Would they be safe? What issues and problems can they see arising? How could they be improved?

**Practical task: Creating a visual display**

Learners amend their plans in the light of the feedback and create a visual display.

**Suggested time:** about 8 hours.

**Activity: Presenting visual displays for comment**

Discussion by learners on different ways to present the reasons why the visual display was created in particular ways. Learners prepare presentations of their displays to present to the class.

**Suggested time:** about 8 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You are asked by a local supermarket to create a visual display for a new product to be situated in the store. The product is a new healthy breakfast cereal targeted at school-age children.

You will need to find out about the product and target market and all the relevant factors that need to be considered for this particular product and target customer.

You will plan to design and create a realistic and appropriate display for the product for use in the store. Its design should be attractive to children and help increase sales of the cereal. You will then present to an audience where you need to explain how the design meets the brief and why you made certain choices, such as fixtures and location of display, in order to attract customers.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You are asked to plan and create a visual display for a different product and target customer.

# Unit B9: Presenting a Business Idea

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will develop the skills to present a business idea to an audience.

## Unit introduction

Have you ever had an idea for a new business or an idea to make a current business better? Although the idea may be good, being able to present your idea to other people is key to the success of taking it forward.

In this unit, you will develop the skills to prepare and present an idea to an audience. You will learn how important it is to be well prepared, making sure you know everything you need to and that you have covered the most important points in your presentation to ensure your business idea is convincing.

The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Prepare for the presentation of a business idea to an audience
- B** Present a business idea to an audience.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Prepare for the presentation of a business idea to an audience	<ul style="list-style-type: none"><li>• Types of business ideas</li><li>• Preparation for a presentation</li><li>• Presentation skills and techniques</li></ul>	<ul style="list-style-type: none"><li>• Observation and witness statements of the pitch.</li><li>• Notes on the characteristics and features of the business idea.</li></ul>
<b>B</b> Present a business idea to an audience		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Self-presentation in business settings</li><li>• Product knowledge</li><li>• Pitching a business idea</li></ul>	<ul style="list-style-type: none"><li>• Product/service/business idea knowledge</li><li>• Presenting using presentation skills and techniques</li></ul>	<ul style="list-style-type: none"><li>• Managing information</li><li>• Communication</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Contribute to discussions, allowing for and responding to others' input.</li> <li>Present information/points of view clearly and in an appropriate way.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Types of business idea

- Idea for new product or service.
- Idea for a new approach to a current product or service.

#### Preparation for a presentation

- Key features of the product:
  - what it is, what it is used for
  - who are the target audience
  - benefits of the business idea to the target audience
  - the unique selling point (USP) of the product or service compared with similar products or services
  - consideration of cost.
- Preparing a draft presentation and speaker notes.
- Practising the presentation, revising and refining.
- Preparing for possible questions about the business idea that may come from the audience.

#### Presentation skills and techniques

- Highlighting key points of the business idea.
- Consideration of the audience:
  - tone of voice
  - clarity of verbal communication
  - maintaining eye contact with audience
  - not reading directly from notes.
- Demonstrating an understanding of the business idea.
- Taking questions from the audience.

### Transferable skills

- Managing information: finding out about the features of the business idea in preparation for the presentation.
- Communication: communicating the features of the business idea to an audience.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Prepare for the presentation of a business idea to an audience</b>		
<b>A.P1</b> Prepare basic information for the presentation of a business idea.	<b>A.M1</b> Prepare information for a presentation, identifying the benefits of the business idea.	<b>A.D1</b> Prepare detailed information for a presentation, identifying the benefits and key features of a business idea.
<b>Learning aim B: Present a business idea to an audience.</b>		
<b>B.P2</b> Present, using acceptable skills and techniques, a business idea to an audience.	<b>B.M2</b> Present, using selected skills and techniques, a business idea effectively to an audience.	<b>B.D2</b> Present, using selected skills and techniques, a business idea clearly and confidently to an audience.

## Essential information for teachers

### Essential information for assessment decisions

#### **For distinction standard**, learners:

- produce detailed and mostly accurate information on the features of their own business idea. The information will cover the key features of the business idea as well as the benefits to the target audience. They will also include information on the USP of their business idea in comparison with similar products or services and a consideration of the costings
- present their business idea, showing a full grasp of its key features and benefits to the audience. They will present confidently, demonstrating a clear awareness of the audience they are presenting to, and not reading directly from their notes or screen. They may take questions from the audience.

#### **For merit standard**, learners:

- produce detailed information on a business idea that is either their own or has been given to them. The information produced will cover the key features of the idea as well as some of the benefits for the target audience
- present the business idea, communicating the key features and the benefits. They will demonstrate an awareness of the audience they are presenting to through appropriate use of language and tone of voice and demonstrate a clear understanding of the business idea.

#### **For pass standard**, learners:

- provide outline information on a business idea that has been given to them and covers its basic features, such as what it is, what it is used for and who the target audience are
- present the given business idea, highlighting its key features and showing some consideration of the audience they are presenting to by maintaining eye contact and showing some consideration of their tone of voice.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Tutors show appropriate footage on good and bad presentations, e.g. *Dragons' Den*. Learners discuss the presentation skills and techniques used and how they can influence people to take your business idea seriously.

**Suggested time:** about 1 hour.

### Activity: Business ideas for products and services

Choose a product and ask learners, in pairs, to write down everything they can think of about the product, e.g. a pencil used for writing, red, grey writing, needs to be sharpened. Learners share ideas by placing sticky notes on a chart in the classroom until every group is complete and all the characteristics of the product are covered.

Divide learners into groups and give each group a product or service. In groups, learners free associate ideas for the product or service. They investigate how customers would use the product or service, whether there are alternatives, what makes the product/service unique, its benefits, disadvantages and price. The groups then present their findings to their peers. Their peers and tutor ask questions on anything not covered by the presenting group about the product or service. Tutors emphasise how important it is to know your product or service well, in order to present it effectively.

**Suggested time:** about 2 hours.

### Activity: Business ideas for processes

In groups, learners free associate ideas for changes to be made to their place of education. Learners investigate the impact the suggested change would have by discussing the benefits. They investigate whether there are alternative suggestions on the same change and look at any disadvantages to the different suggestions. The groups present their findings to their peers. Their peers and tutor ask questions on anything not covered by the presenting group about the suggested change. Tutors emphasise how important it is to know what and how you want to change, in order to present it effectively.

**Suggested time:** about 2 hours.

### Activity: Presenting business ideas using presentation communication skills

Tutors give different products to groups of learners, instructing them to write down everything they can think of about the product.

Learners then practise presenting their product to one of their peers, explaining its key features and benefits. Learners discuss between them the presentation techniques that were used and how they could be improved.

Learners split into two groups: the first group works on a mind map of the pros of mobile phones; and the second group works on a mind map of the cons. The groups then debate the pros and cons of mobile phones. Tutors highlight any persuasive communication skills that were used during this exercise and lead a discussion on the different presentation communication skills.

**Suggested time:** about 2 hours.

**Activity: Presenting effectively**

In pairs, learners identify their own product/service/new efficient procedure and make a mind map of their investigation into the features of the business idea. Learners then present their business idea to their peers. Peers are given the opportunity to ask questions, with learners' answers attempting to further convince peers of the business idea. Peers complete peer observation forms, citing areas of weakness to improve.

**Suggested time:** about 2 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You have been asked to present an idea to the manager of your centre that an end of year prom would be a good business opportunity for the organisation. You will need to prepare for the presentation by gathering information on the key features of the idea as well as the benefits to the centre and the potential target audience. You have been given a five-minute window to present this idea to the manager, so you need to practise your presentation and use the appropriate skills and techniques to get your ideas across clearly.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You need to convince a local sports shop that your business idea for a new sports cafe is worth consideration. You must ensure that you gather as much information about the features of the business idea as possible and use appropriate skills and techniques when presenting your idea.

# Unit B10: Contribute to Running an Event

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will develop the skills required to organise and contribute to running a small enterprise event to raise money for a cause.

## Unit introduction

Do you enjoy going to events organised by other people? Perhaps you like organising activities and events for you and your friends? Businesses run events to raise money for different causes, for example a cake sale or flea market to raise money for a charity.

In this unit, you will learn how to plan and contribute to the running of a small enterprise event such as a local fundraising activity or a vintage clothes sale. You will work with others to organise and plan the event and then take a role on the day to ensure the event is enjoyable and successful. You will develop skills in planning and working well with other people. You will learn how to work within a timeframe and manage the event budget by not spending more money than you have been allocated for the event. You will also learn to multitask and communicate with others during the running of the event.

The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Contribute to the organisation of an event
- B** Work as part of a team to run an event.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Contribute to the organisation of an event	<ul style="list-style-type: none"><li>• Factors to consider when organising a small event to raise money</li><li>• Allocating roles and responsibilities for the event</li><li>• Contributing to running a small event</li><li>• Working with others to organise and run an event</li></ul>	<ul style="list-style-type: none"><li>• Plan.</li><li>• Observation and witness statements.</li></ul>
<b>B</b> Work as part of a team to run an event		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Running an event</li><li>• Organising skills</li><li>• Working as part of a team</li><li>• Time management</li></ul>	<ul style="list-style-type: none"><li>• The process to run events</li><li>• Understand the different activities to be undertaken when running an event</li><li>• Awareness of health and safety and budget</li></ul>	<ul style="list-style-type: none"><li>• Planning</li><li>• Teamwork</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Make relevant and extended contribution to discussions, allowing for and responding to others' input.</li> <li>Write clearly and coherently, including the appropriate level of detail.</li> </ul>
<b>Mathematics</b>	<ul style="list-style-type: none"> <li>Add, subtract, multiply and divide whole numbers using a range of strategies.</li> <li>Solve problems requiring calculation with common measures, including money, time, length, weight, capacity and temperature.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Factors to consider when organising a small event to raise money

- Type and purpose of a small event could be to raise money such as a charity fundraiser or for a celebration. It could also be an event to attract interest, e.g. a breast cancer awareness event.
- Costs, e.g. budget available, price of resources and equipment.
- Target audience, e.g. teenagers, parents, staff.
- Venue, e.g. cost of the location, size, date and time of event.
- Cost of advertising the event.
- Cost of resources required, e.g. furniture, equipment, catering, special requirements – disability and dietary requirements.

#### Allocating roles and responsibilities for the event

- Ensuring everyone has a clearly defined and equal role in the team.
- Roles such as front of house, sales, administration, technical support, customer service.
- Responsibilities such as collecting money, directing customers, selling products, re-stocking.

#### Contributing to running a small event

- Setting up, e.g. venue, health and safety considerations, dealing with problems.
- Ensuring deadlines are met when setting up the event.
- Carrying out individual roles during the event.
- Tidying up after the event, e.g. clearing venue.

#### Working with others to organise and run an event

- Working with others to ensure smooth running of the event.
- Communicating effectively with team members.
- Helping out others when necessary.

### Transferable skills

- Planning: allocating the budget and roles to members of the team as well as planning resources and running the event.
- Teamwork: working collaboratively with others to meet deadlines in planning and running the event.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Contribute to the organisation of an event</b>		
<b>A.P1</b> Produce a simple event plan and make a contribution to the organisation of an event.	<b>A.M1</b> Produce an appropriate event plan and make a positive contribution to the organisation of an event.	<b>A.D1</b> Produce a detailed event plan, showing some leadership skills when organising an event.
<b>Learning aim B: Work as part of a team to run an event</b>		
<b>B.P2</b> Work as part of a team, taking some responsibility for own role.	<b>B.M2</b> Work as part of a team, taking responsibility for own role.	<b>B.D2</b> Work as part of a team, taking full responsibility for own role and making effective contributions.

## Essential information for tutors

### Essential information for assessment decisions

**For distinction standard**, learners:

- produce a coherent plan that holds together logically and explains in detail the factors that need to be considered, including a budget and potential barriers that could be encountered and how they will be overcome. The plan must include a detailed breakdown of costs for their allocated role, e.g. if their role was breaking down the costs for advertising into itemised stationery costs and showing investigation into the costs having commercial advertising
- participate and independently contribute to running the event by demonstrating leadership skills, showing initiative, making decisions and thinking of contingency plans if needed when running the event. Show a consistent monitoring of the budget. Delegate to others.

**For merit standard**, learners:

- produce a detailed plan that describes some of the factors that need to be considered and includes allocation of names to tasks and deadlines to be adhered to. The plan must include a breakdown of the costs for their allocated role, e.g. if their role was advertising, breaking down the costs for advertising into itemised stationery costs
- participate and contribute to running the event, which enhances the event and the customers' experience of the event. They show contribution by taking on further roles when they present themselves and show some monitoring of the budget.

**For pass standard**, learners:

- produce an outline plan that lists some of the factors that need to be considered as well as listing costs for their allocated role, e.g. if their role was advertising, a cost for advertising. The plan may exclude allocation of names to tasks and deadlines to be adhered to
- participate and contribute to organising and running the event, showing some working with others.

### Essential resources

For this unit, learners will need access to an appropriate venue for the event, for example a classroom, hall, refectory or off-site venue. Learners also need IT equipment and basic catering equipment.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Learners discuss the different events they have attended and the positives and negatives of each. Tutors lead a discussion on what makes events successful and how less successful events could be improved. Learners list types of small events. Learners discuss the purpose/aim of the event, who the event is aimed at and how to ensure the planning and running of the event meets its purpose/aim. With support, learners discuss the event options and choose a small event to run.

**Suggested time:** about 4 hours.

### Activities: Guest speaker and visiting venue

Guest speakers, such as an event's organiser, and a visit to local venues, function suites or other events could provide valuable insight for learners, highlighting areas of consideration. Tutors discuss health and safety requirements with learners.

**Suggested time:** about 8 hours.

### Activities: Teamwork

Tutors discuss the different roles needed to organise and run an event with learners. Learners set clear objectives for their event and record them individually. Learners discuss and agree job roles, deciding who is responsible for specific tasks and recording this individually. Learners identify any potential barriers to success and discuss ways to overcome them. Tutors design checklists for learners to help them plan efficiently and run the event according to plan.

**Suggested time:** about 8 hours.

### Activities: Gathering resources and sourcing venue

Learners keep a record of the different activities involved in planning an event. Learners hold meetings to discuss the event planning and sourcing a venue that is fit for the size, purpose and date/time of venue. Learners look at the resources required for their event and record what they need and the costs of what they need. Tutors help source the resources required.

**Suggested time:** about 10 hours.

### Practical task: Running an event (mock scenario)

Learners complete their checklists and all necessary planning duties. Learners discuss potential barriers to the running of an event and how to overcome them while preparing for an event. Learners work as a team, making individual contributions to the running of the small event (mock scenario) that they have planned for.

**Suggested time:** about 5 hours.

### Practical task: Running the event (mock scenario)

Learners carry out their predetermined roles and responsibilities when setting up, running and clearing up after a mock event.

- Set up.
- Event reception.
- Clearing up.

Guests complete feedback sheets on the event.

**Suggested time:** about 4 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You are asked to run a cake sale to raise money for the school library. You will work as a team, taking on roles and responsibilities, sourcing a venue and resources and costing up the event.

You will meet regularly as a team to ensure plans and deadlines are being met and that any problems are resolved. You will complete a plan documenting all the factors that need considering, detailing your contribution and role in the team and how you will assist in the organisation and running of this event.

You will then hold the cake sale to raise money for the British Heart Foundation. You will work as a team to set up, run and tidy up after the event.

### **If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

You have been asked to raise money for your prom by running a small flea market. You will work as a team, taking on roles and responsibilities, sourcing a venue and resources and costing up the event.

You will meet regularly as a team to ensure plans and deadlines are being met and that any problems are resolved. You will complete a plan documenting all the factors that need considering, detailing your contribution and role in the team and how you will assist in the organisation and running of this event.

You will then hold the flea market to raise money for the prom. You will work as a team to set up, run and tidy up after the event.



# Unit B11: Recording Income and Expenditure

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will record and compare income and expenditure manually or using spreadsheet software.

## Unit introduction

It is vital that businesses keep track of the money coming in and the money that is used to pay for expenses. It is important that businesses monitor their income and expenditure by keeping clear and accurate records so that they can make sure that the business is not spending more than it is getting in.

In this unit, you will learn how well the business is doing by recording the income and expenditure. Some smaller businesses do this on paper, manually, while others use spreadsheet software to record the income and expenses of a business. Spreadsheet software can do all the mathematical calculations for you and all you have to do is keep good records. You can also make charts using the software to compare the income and expenses for each month throughout the year.

The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Record income and expenditure of a business for a set period of time
- B** Compare income and expenditure of a business for a set period of time.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Record income and expenditure of a business for a set period of time	<ul style="list-style-type: none"><li>• Types of income and expenditure in a business</li><li>• Recording income and expenditure</li><li>• Comparing income and expenditure for a set period of time</li></ul>	<ul style="list-style-type: none"><li>• A record of income and expenditure over a set period of time</li><li>• A graphical representation of income and expenditure</li></ul>
<b>B</b> Compare income and expenditure of a business for a set period of time		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Use of basic calculations</li><li>• Data presentation using graphs/charts</li></ul>	<ul style="list-style-type: none"><li>• Income</li><li>• Expenditure</li><li>• Spreadsheet software</li></ul>	<ul style="list-style-type: none"><li>• Managing information</li><li>• Presenting information</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Utilise information contained in texts.</li> <li>Present information in a logical sequence.</li> </ul>
<b>Mathematics</b>	<ul style="list-style-type: none"> <li>Understand and use whole numbers and understand negative numbers.</li> <li>Use simple formulae expressed in words for one- or two-step operations.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Types of income and expenditure in a business

- Income, which can also be called revenue, is what a business receives on a daily or monthly basis and includes sales revenue, rent received, interest received.
- Expenditure is what a business pays out on a daily, monthly or annual basis. It includes rent on property, telephone, electricity, wages, salaries, repairs, fuel, advertising, buying stock (inventory), e.g. shoes for a shoe shop. Explanations of each type of expenditure must be covered.

#### Recording income and expenditure

- Calculating income and expenditure manually by placing the appropriate expenditure and income into columns and calculating the differences for each month for a set period of time.
- Manually creating a chart to graphically represent the differences in the income and expenditure over a set period of time.
- Using spreadsheet software to input income and expenditure.
- Enhancing headings for columns and rows using different font styles and sizes.
- Creating simple borders to enhance the appearance of a table in a spreadsheet to make it easier to read.
- Using IT to calculate, using formulae to obtain totals of income and expenditure and calculate profit and loss, including sum, minus {+, -, =SUM(cell:cell)}.
- Using IT to create charts and graphs, e.g. column chart, bar chart, single line graph to represent income and expenditure over a set period of time.

#### Comparing income and expenditure for a set period of time

- Expenditure that could be cut back.
- Income that could be generated.

### Transferable skills

- Managing information: identifying and recording income and expenditure.
- Presenting information: organising and representing income and expenditure of a business in different ways, e.g. as a table and as a chart.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Record income and expenditure of a business for a set period of time</b>		
<b>A.P1</b> Produce an outline record of income and expenditure over a set period of time.	<b>A.M1</b> Produce a detailed record of income and expenditure over a set period of time.	<b>A.D1</b> Produce a detailed and mostly accurate record of income and expenditure over a set period of time.
<b>Learning aim B: Compare income and expenditure of a business for a set period of time</b>		
<b>B.P2</b> Produce a simple comparison of income and expenditure, as a chart or graph, over a set period of time.	<b>B.M2</b> Produce a detailed comparison of income and expenditure, as a chart or graph, over a set period of time.	<b>B.D2</b> Produce a comprehensive comparison of income and expenditure, as a graph or chart, over a set period of time.

## Essential information for tutors

### Essential information for assessment decisions

#### For distinction standard, learners:

- produce either a manual or computer-generated, mostly accurate, record of income and expenditure for a set period of time. The record captures the correct figures of income and expenditure in the correct columns with very few errors. The record includes mostly accurate monthly and final calculated totals of income and expenditure
- produce a manual or computer-generated, mostly accurate, graphical representation of the data produced in learning aim A as a chart/graph. The chart/graph shows a monthly calculation of differences between income and expenditure for the set period of time. It will be presented with appropriately named labels for headings such as the title and column and row headings. It contains a clear legend. The axis of the chart should be formatted logically and be easy to read and make sense of.

#### For merit standard, learners:

- produce a reasonably accurate written or computer-generated record of income and expenditure for a set period of time, with a few errors. The record captures, for the most part, the correct figures of income and expenditure, and places the data predominantly in the correct columns with reasonably accurate calculations of totals for each month for the income and expenditure
- produce a manual or computer-generated graphical representation of the data as a chart/graph, showing a clear comparison of income and expenditure over the set period of time with labels for the title, axes and a legend.

#### For pass standard, learners:

- produce either a manual or computer-generated list of income and expenditure that should be in two columns headed income and expenditure. The list could contain errors such as data in the wrong columns or figures not copied correctly
- produce a manual or computer-generated graphical representation of the comparison of data as a chart/graph, showing a basic comparison of income and expenditure over the set period of time with labels for the two axes.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction to unit

Tutors define income and expenditure. Learners work with a partner to list their personal income and living expenses. In groups, learners brainstorm on sticky notes and list income and expenses for a business.

In groups, learners discuss what they believe their future expenses could be and how they would deal with them if they exceeded their income. Tutors lead a discussion with learners on how to do this: cutting costs by shopping around for utilities, food, cutting spending on luxury items and finding cheaper accommodation while sourcing better-paid work. Tutors use the example of expenses being higher in winter and asking learners why this could be: due to heating being costly in winter.

**Suggested time:** about 6 hours.

### Activity: Using business terminology for income and expenses

Tutors ask learners to think about different types of business income and expenditure and write them down in groups on A3 paper. Tutors explain the correct business terminology for income and expenses listed. Cards with different incomes and expenditures of a business can be used as a sorting activity for learners. A box with receipts, bank statements and invoices could be given to each group for sorting into income and expenditure.

Tutors show learners a simple format of an income and expenditure table and ask learners, in their groups, to tabulate the income and expenditures from the cards to a given table. They can then individually tabulate their personal income and expenses.

**Suggested time:** about 8 hours.

### Activity: Introducing spreadsheet software

Tutors ask learners what spreadsheets can be used for. Tutors demonstrate how to open spreadsheet software and explain the difference between columns, rows and cells. Learners take a screenshot of a workbook screen on spreadsheet software and label the columns, rows and cells. Learners practise using the software by populating cells with given data.

Tutors demonstrate how to enhance the table using different font styles and sizes and learners individually practise using them. Tutors demonstrate how to create borders to enhance the appearance of the table to make it easier to read and learners individually practise creating them.

Tutors provide an exercise on income and expenditure for learners to capture, placing items into the correct columns, enhancing headings and creating simple borders. Tutors can choose to do this manually.

**Suggested time:** about 8 hours.

### Activity: Using simple formulae

Tutors ask learners to total their income and expenditure columns manually from their previously completed exercises. In groups, learners make suggestions on how to add up on spreadsheet software and investigate how this can be achieved. Tutors demonstrate how to use the SUM and + formulae to total income and expenditure columns. Tutors explain how data can be updated automatically when formulas are used. Learners practise using the SUM and + formulae on spreadsheets that have previously been created to total the income and expenditure.

**Suggested time:** about 8 hours.

**Activity: Creating charts and graphs**

Tutors demonstrate how to manually create a graph from given data and learners practise creating them. Tutors ask learners to capture three months of given data on a spreadsheet for a business.

Tutors demonstrate how to create a chart/graph on spreadsheet software. They ask learners to explore the different types of charts/graphs available on the spreadsheet software and suggest which would be suitable to show comparisons of income and expenditure and for comparisons of profits achieved over the three months. Learners create a chart/graph to compare income and expenditures for the three months in the given exercise.

**Suggested time:** about 8 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You have been asked by the sports club where you are volunteering to produce a record of income and expenditure from the box of accounting documents that they give you. They ask you to compare the income and expenditure for a set period of time.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

A family member has asked you to produce a record of income and expenditure for the home accounts from a box of receipts, bank statements and invoices they have given to you. They don't know much about money issues and so have asked you to compare the incomes and expenditure for a set period.

# Unit B12: Communicating with Customers

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will communicate with customers in customer service situations.

## Unit introduction

All businesses need to keep their customers happy because happy customers are more likely to come back and to tell their friends about the business. If you can communicate well with customers it will help them find what they need, buy what they need and be happy when they leave the business. By communicating well, you help the business give good customer care. This in turn makes the business more successful and a better place to work.

In this unit, you will learn how to speak to customers and how you can help them to get what they want. You will build your confidence in using your communication and personal skills to approach customers. You will also learn to make decisions quickly when dealing with customers.

The skills you learn in this unit will give you confidence and will be valuable in other units. This will help you to move to different Level 2 qualifications. The transferable and sector skills you develop in this unit can enable you to progress to further learning. They will also support you in completing the core skills units in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Communicate with customers in customer service situations
- B** Solve problems when communicating with customers.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Communicate with customers in customer service situations	<ul style="list-style-type: none"><li>• Purpose of good customer communication</li><li>• Using communication skills and behaviours in customer service situations</li><li>• Solving customer problems</li></ul>	<ul style="list-style-type: none"><li>• Observation records, witness statements of role playing.</li><li>• Film footage of role playing in customer service situations.</li></ul>
<b>B</b> Solve problems when communicating with customers		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Speaking clearly and appropriately</li><li>• Listening carefully for understanding</li><li>• Adjusting information or delivery to meet the needs of the customer</li><li>• Anticipating the needs of the customer</li><li>• Behaving appropriately for the situation</li></ul>	<ul style="list-style-type: none"><li>• Needs of different customer groups</li><li>• Dealing with all customers fairly and with respect</li><li>• Verbal and non-verbal communication</li></ul>	<ul style="list-style-type: none"><li>• Self-management</li><li>• Problem solving</li></ul>

**There are opportunities to develop functional skills in this unit:**

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Make relevant and extended contributions to discussions, allowing for and responding to others' input.</li> <li>Prepare for and contribute to the formal discussion of ideas and opinions.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Purpose of good customer communication

- To inform customers about products or services, to confirm information, to deal with customer requests and queries.
- Importance of customer service to a business, e.g. keep customers returning to the business.
- Importance of product and service knowledge to ensure correct information about product and services is given to customers.

#### Using communication skills and behaviours in customer service situations

- Using verbal communication skills such as active listening, confirming meaning, speaking clearly at an appropriate speed, tone and volume, asking customers appropriate questions, being polite, approachable and enthusiastic.
- Using non-verbal communication skills such as making eye contact, smiling, awareness of personal space, relevant body language.

#### Solving customer problems

- Different customer problems, including providing simple information, advice, resolving product problems, dealing with complaints, special needs customers.
- Steps in problem solving, including:
  - problem identification using probing questions and active listening skills to understand the problem that needs resolving
  - looking for solutions
  - making and implementing decisions.
- Ensuring body language and tone of voice is not aggressive or defensive.
- Referring to a higher authority when the issue is unresolvable.

#### Transferable skills

- Self-management: being flexible, showing adaptability when responding to different situations and when communicating with customers, showing initiative when dealing with customers and their queries.
- Problem solving: answering questions asked by customers, dealing with issues that may arise and using initiative when communicating with customers.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Communicate with customers in customer service situations</b>		
<b>A.P1</b> Use basic verbal communication skills in customer service situations.	<b>A.M1</b> Use competent verbal and non-verbal communication skills in customer service situations.	<b>A.D1</b> Use confident verbal and non-verbal communication skills in customer service situations.
<b>Learning aim B: Solve problems when communicating with customers</b>		
<b>B.P2</b> Demonstrate some ability to solve problems when communicating with customers.	<b>B.M2</b> Demonstrate ability to solve problems when communicating with customers, making suggestions for solutions.	<b>B.D2</b> Demonstrate a confident ability to solve problems when communicating with customers, suggesting solutions and making decisions.

## Essential information for tutors

### Essential information for assessment decisions

**For distinction standard**, learners:

- use verbal communication skills in a self-assured way in customer service situations
- demonstrate non-verbal communication skills such as active listening, making eye contact, and using relevant body language
- show evidence of secure and mostly accurate in-depth knowledge and understanding of product/service conveyed to the customers
- demonstrate use of most of the steps in problem solving by identifying and resolving problems presented effectively and efficiently.

**For merit standard**, learners:

- use most of the verbal communication skills proficiently in customer service situations
- demonstrate non-verbal communication through appropriate use of body language most of the time in customer service situations
- demonstrate evidence of detailed knowledge of the product/service conveyed to the customers in customer service situations
- demonstrate the ability to solve problems by offering more than one solution to problems presented.

**For pass standard**, learners:

- use limited verbal communication skills in customer service situations, with little attention to non-verbal communication
- demonstrate limited but adequate product/service knowledge conveyed to the customers in customer service situations
- use some steps in problem solving by identifying and attempting to resolve problems presented satisfactorily but not completely.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### **Activity: Examples of effective and ineffective verbal communication skills**

Tutors show different examples of effective and ineffective verbal communication skills and learners discuss their effects on the customer and ultimately the business. A variety of media could be used, for example YouTube™ clips, learners' own experiences, field observations and scripted role play.

Learners could fill out worksheets identifying verbal skills from video footage or record their own footage to present to the class.

Vocational and transferable skills to be covered must include verbal communication skills, for example pitch, volume, tone, speed of speech, enunciation, appropriate use of language, closed and open question types, probing questions, confirming questions, listening skills, working effectively with others, resilience and attitudes to others and work.

**Suggested time:** about 4 hours.

### **Activity: Examples of effective and ineffective non-verbal communication skills**

Tutors show different examples of effective and ineffective non-verbal communication skills and learners discuss their effects on the customer and ultimately the business. A variety of media could be used, for example YouTube clips, learners' own experiences, field observations and scripted role play.

Learners could fill out worksheets identifying non-verbal skills from video footage or record their own footage to present to the class.

Vocational and transferable skills to be covered must include non-verbal communication skills, for example body language, working effectively with others, resilience and attitudes to others and work.

**Suggested time:** about 6 hours.

### **Activity: Role play of dealing with customers seeking advice and returns**

Learners participate in a role play that deals with customers seeking advice on a product/service and on returning goods. Learners develop skills in dealing with customers who have disabilities, for example people with hearing, sight and physical impairments and could be given the opportunity to advise them.

Role play could be created by tutors or developed by learners. Scripts for the role play should give opportunities to cover different customer service contexts, for example assisting customers with finding a product, returns, communicating with customers with disabilities, telephonic customer service.

**Suggested time:** about 8 hours.

### **Activity: Role play of dealing with a customer complaint**

Learners participate in a role play that deals with a customer complaint, including over the phone, and referring to a higher authority when appropriate.

Role play can be created by tutors or developed by learners. Scripts for the role play should give opportunities to cover different customer service contexts, for example difficult customers, telephonic complaints and referring to a higher authority when appropriate.

The role play should embrace as many of the personal and vocational skills as possible.

**Suggested time:** about 8 hours.

### **Activity: Using a range of communication skills**

Learners practise a range of communication skills in role play, filming themselves with digital cameras.

**Suggested time:** about 10 hours.

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### **Suggested scenario**

You are employed as a shop assistant at a sports shop. In the role play you will be presented with a number of different scenarios where you will deal with customers. You will provide assistance, making sure you use communication skills and behaviours and resolve problems when communicating with customers.

**If a resit assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity.**

Your manager has asked you to work in the shoe department. In the role play you will be presented with a number of different scenarios where you will deal with customers. You will provide assistance, making sure you use communication skills and behaviours and resolve problems when communicating with customers.



# Unit B13: Developing Routine Office Administration Skills

Level: **1**

Unit type: **Sector (Business)**

Guided learning hours: **40**

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## Unit in brief

Learners will develop skills in carrying out a range of routine office administration tasks in a simulated office environment.

## Unit introduction

In this unit you will be introduced to a number of routine administration tasks that you could be asked to do when working in an office. You will learn how to respond to instructions and how to plan to complete the office administration tasks by selecting and using the appropriate office equipment and software and, following standard processes and procedures.

By completing these office administration tasks, you will develop key transferable skills such as time management and managing information. The transferable and sector skills you develop in this unit will enable you to progress to further learning. They will also support you in completing the core skills in Group A of the qualification.

## Learning aims

In this unit you will:

- A** Prepare to carry out routine office administration tasks
- B** Carry out routine office administration tasks.

## Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Prepare to carry out routine office administration tasks	<ul style="list-style-type: none"><li>• Preparing to carry out office administration tasks</li><li>• Selecting appropriate office equipment for the tasks in hand</li><li>• Carry out routine office administration tasks</li></ul>	<ul style="list-style-type: none"><li>• Checklist of equipment and resources</li><li>• Photographs, observation, witness statements</li><li>• Produced documents</li><li>• Screen shots</li></ul>
<b>B</b> Carry out routine office administration tasks		
<b>Key teaching areas include:</b>		
Sector skills	Knowledge	Transferable skills
<ul style="list-style-type: none"><li>• Identifying correct equipment and office supplies needed for office administration tasks</li><li>• Prioritising tasks</li><li>• Following standard processes and procedures</li><li>• Skill requirements for working in an office and carrying out routine tasks</li></ul>	<ul style="list-style-type: none"><li>• Working safely</li><li>• Office equipment</li><li>• Routine office administration tasks</li><li>• Tools to organise time and prioritise tasks</li></ul>	<ul style="list-style-type: none"><li>• Planning</li><li>• Self-management</li></ul>

### There are opportunities to develop functional skills in this unit

Functional skills	
<b>English</b>	<ul style="list-style-type: none"> <li>Take full part in formal and informal discussions and exchanges that include unfamiliar subjects.</li> <li>Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience.</li> </ul>
<b>Mathematics</b>	<p>Representing</p> <ul style="list-style-type: none"> <li>Understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine.</li> <li>Identify and obtain necessary information to tackle the problem.</li> <li>Select mathematics in an organised way to find solutions</li> </ul> <p>Analysing</p> <ul style="list-style-type: none"> <li>Apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes.</li> <li>Use appropriate checking procedures at each stage.</li> </ul>



## Unit content

### Knowledge and sector skills

#### Office equipment

- Types and uses of office equipment, e.g. telephone, computer, photocopier, printer, scanner, filing equipment, paper shredder, recycle bins; selecting the right equipment for the task.
- Checking equipment is in working condition and reporting office equipment problems.
- Checking and maintaining office supplies e.g. paper, corporate letterheads, staples, printing ink, stationery, sharpened pencils, erasers.

#### Routine office administration tasks

- Following business procedures for routine office administration tasks.
- Using and caring for office equipment, including: leaving office equipment ready for next user.
- Confidentiality by introducing the General Data Protection Regulation (GDPR).
- Following correct business procedures.
- Organising time and prioritising e.g. task lists, schedules.
- Office type administration tasks, including:
  - producing accurate, well-formatted documents using information technology, organisation templates, e.g. letters, agendas, invoices.
  - managing paperwork e.g. filing and retrieving documents, photocopying, dealing with waste.
  - managing incoming mail e.g. collecting, sorting, distributing
  - managing outgoing mail e.g. folding documents, envelopes, addresses, postage/franking
  - welcoming visitors and answering and making telephone calls
  - using appropriate manner and language
  - following business procedures for welcoming visitors
  - informing visitors of health and safety procedures
  - developing listening skills
  - taking and giving accurate messages
  - coordinating arrangements for meetings, e.g. sending information to delegates, booking meeting room
  - maintaining diary or calendar for an individual or team
  - dealing with waste e.g. recycling.

### Transferable skills

- **Planning:** setting deadlines for different tasks, identifying necessary resources needed in the office, prioritising tasks.
- **Self-management:** meeting the demands of carrying out routine office administration tasks, dealing with barriers that may affect routine tasks, time management, seeking clarification from colleagues on the requirements of routine tasks.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Prepare to carry out routine office administration tasks</b>		
<b>A.P1</b> Prepare for office administration tasks to meet some requirements of the tasks.	<b>A.M1</b> Prepare for office administration tasks to meet most of the requirements of the tasks.	<b>A.D1</b> Prepare for office administration tasks to meet all the requirements of the tasks.
<b>Learning aim B: Carry out routine office administration tasks</b>		
<b>B.P2</b> Carry out routine office administration tasks adequately, using equipment and office supplies to meet some requirements of the tasks.	<b>B.M2</b> Carry out routine office administration tasks, using equipment and office supplies to meet most of the requirements of the tasks.	<b>B.D2</b> Carry out routine office administration tasks, using equipment and office supplies to coherently meet the requirements of the tasks.

## Essential information for tutors

### Essential information for assessment decisions

#### For distinction standard, learners:

- select all the essential equipment and office supplies to meet the requirements of the tasks. They take action to cover all potential unforeseen circumstances that could arise, with regards to insufficient office supplies and check that all equipment is in working order.
- carry out routine office administration tasks efficiently, confidently using the appropriate office equipment and office supplies to fully meet the requirements of the tasks. They follow business procedures thoroughly. They consistently ensure the confidentiality of documents and personal information. They prepare and manage documents accurately which are well structured, e.g. emails, letters, minutes. They have excellent filing systems, evident in their retrieval and filing of documents. Learners clearly organise their time by prioritizing office administration tasks. Learners leave equipment ready for further use and ensure that the environment is clean and tidy. They demonstrate full awareness of recycling waste.

#### For merit standard, learners:

- select some essential equipment and office supplies to meet the requirements of the tasks. They take action to cover at least one potential unforeseen circumstance that could arise, with regards to sufficient office supplies and check that most of the equipment is in working order.
- carry out routine office administration tasks effectively, using the appropriate office equipment and office supplies to meet most of the requirements of the tasks. They mostly follow business procedures. They ensure the confidentiality of documents and personal information most of the time. They prepare and manage documents which are mostly accurate, with one or two errors. The documents are well structured, e.g. emails, letters, minutes. They have good filing systems, evident in their retrieval and filing of documents. Learners organise their time most of the time by prioritizing office administration tasks. Learners leave most of the equipment ready for further use and ensure that the environment is clean and tidy most of the time. They demonstrate awareness of recycling waste most of the time.

#### For pass standard, learners:

- select equipment and office supplies to meet the requirements of the tasks, but may omit essential equipment or office supplies and have to source them while they are carrying out the task. They may not check that there are sufficient office supplies or check that equipment is in working order.
- carry out routine office administration tasks but may need prompting to use the appropriate office equipment and office supplies to meet the requirements of the tasks. They may need prompting to follow business procedures. They ensure the confidentiality of documents and personal information some of the time. They prepare and manage documents which may contain errors and may not be well structured. They have simple filing systems which may not be efficient for retrieval and filing of documents. Learners may not prioritize the office administration tasks. Learners leave some of the equipment ready for further use and may omit to ensure that the environment is clean and tidy. They demonstrate awareness of recycling waste most of the time.
- carry out routine office administration tasks, while being prompted to prepare and use the correct office equipment and resources. They may not show any awareness of document and data confidentiality e.g. GDPR when working with documents. They follow procedures for given office administration tasks but will need prompting. They provide and take information but may make errors. They prepare and deal documents e.g. emails, documents prepared with information technology, retrieving and filing, with errors. Learners show little or no evidence of organising their time and prioritising their tasks. Learners may need prompting in leaving the equipment and the environment clean and tidy.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both the core and sector skills. The following are suggestions for activities and workshops that tutors can use in preparation for the final assessment and are not intended as a definitive guide to cover the full GLH of the unit.

### Introduction

Introduce the unit by tutor led presentation and small-group discussion on types of administration tasks that may exist in an office. Paired learner work researching different types of office equipment and resources needed for office administration tasks.

**Suggested time:** 2 hours.

### Activity: Office Equipment Usage

Tutor demonstrates how to use the different office equipment e.g. telephone, printer, photocopier. Learners in small groups asked to identify how each piece of equipment can be used for administration tasks. They could then present the uses of the equipment to the rest of the class either from an illustrated poster or PowerPoint presentation. Tutor discusses the importance of keeping equipment clean, reporting any problems and leaving the equipment ready for the next user.

Learners work in groups to select equipment and resources from a list of given tasks and feed back to the class on why they selected them.

**Suggested time:** 6 hours

### Activity: Administration tasks – Adhering to Business Procedures

Learners should have the opportunity to carry out practical tasks, whether through using a model office at the centre or through external links. Learners must have access to office equipment so that they can practise their skills by completing administration tasks.

Tutor discusses the following of business procedures e.g. manner and language, giving information when welcoming visitors; listening, taking messages, giving information when answering telephone calls; giving messages to colleagues, filing systems.

**Suggested time:** 2 hours.

### Activity: Administration tasks – Organising Time and Prioritising Work

Tutor-led discussion on the importance of organising time and prioritising work. Examples of tools used to organise time, such as task lists, would be helpful when discussing organising time and prioritising tasks.

Tutor then provides a list of tasks that need to be completed. In small groups, learners practise completing work schedules or task lists, and placing the work in the correct order of priority.

**Suggested time:** 2 hours.

**Activity: Importance of Confidentiality at Work**

Discussions should take place regarding what types of information need to be kept confidential. Why is it important to keep some information confidential?

Learners could discuss information relating to themselves that they regard as confidential and how they would feel if others knew about it. The centre's own rules relating to confidentiality could be used as an example.

Tutor could give learners different types of information. Learners to decide whether the information should be confidential.

Case studies highlighting the consequences of confidential information not being treated properly should be explored.

There are free online accessible presentations instructing learners of the basic requirements of the GDPR.

This can be reinforced by simulated demonstrations regarding the safe handling and disposing of information in the classroom. Scenarios highlighting the consequences of not adhering to GDPR should also be demonstrated.

**Suggested time:** 2 hours

**Activity: Administration tasks – Using the computer for Administration Tasks**

Tutor demonstrates the use of a computer for administration tasks in an office, showing learners the different software used for different administration tasks, e.g. writing an email; producing agendas for meetings; producing basic documents such as a list of resources needed; using the internet; making appointments or keeping an office diary and producing presentations. Tutor discusses why confidentiality and having knowledge of the GDPR is important to know, for administration tasks.

There are a range of free online programmes, to allow students to develop their typing skills in a relaxed way. Timed dictation sessions and recorded messages or speeches from the internet that learners have to transcribe by typing.

Tutor provides the learners with tasks at end of each point of delivery on each topic to enable learners to practise the newly learnt skills e.g. send and receive an email; producing an agenda; type a document, searching the internet, making appointments.

**Suggested time:** 10 hours.

**Activity: Administration Tasks – Managing mail**

Tutor shows footage on collecting, sorting and distributing incoming mail and preparing outgoing mail for postage. Learners are given a task for both incoming and outgoing mail for practice.

**Suggested time:** 4 hours.

**Activity: Managing Paperwork and Minimising Waste.**

Tutor led discussion on managing paperwork and minimising waste. Learners research the importance of recycling paper waste.

**Suggested time:** 2 hours.

**Activity: Talk from office workers**

Arrange for short talks from people that work in different offices. Guest speakers could provide useful input on the importance of following instructions and organisational procedures accurately, as well as on the importance of presenting oneself appropriately about dress and manner.

Emphasis should be placed on the necessary legal requirements of GDPR when handling information in each of their jobs and the consequences of not following GDPR requirements.

This could include administration staff from a local business; GP surgery; school or college.

**Suggested time:** about 2 hours.

**Activity: Shadowing an office worker**

Learners visit a large office to observe the main administration roles in different departments such as customer service, reception, finance.

Learners can develop an understanding of the roles of an office worker by shadowing a colleague in an administration department of the school or college they are attending. This can provide an understanding of the different skills needed to carry out the range of tasks in a typical working day: making phone calls; maintaining an office diary; booking equipment; booking meetings; preparing documents for meetings; safe disposal of documents; use of printer to produce a range of documents; ordering equipment; maintaining office equipment and how the office links to other areas of the areas of the institution.

Confidentiality will need to be considered so that students do not have access to sensitive information of other students or members of staff.

**Suggested time:** about 5 hours.

## Suggested assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity.

### Suggested scenario

You need to complete two office administration tasks, one being customer related and the other office administration related. In carrying out these tasks you will need to demonstrate:

- selecting and checking the equipment and resources you need to carry out the administration tasks you have been given, highlighting why you have selected them.
- carrying out at the two tasks correctly, according to instructions given to you by your supervisor.
- use of key equipment where appropriate
- use of tools to organise time.

**If a retake assessment is necessary, an alternative activity must be used. The following is an example of a retake assessment activity:**

Select and check equipment and resources for two different tasks, one being customer related and the other being office administration related and carry out these tasks.





## 4 Planning your programme

### How do I choose the right BTEC Introductory qualification for my learners?

BTEC Introductory qualifications come in three sizes, the Award, the Certificate and the Diploma, each with a specific purpose. You will need to assess learners carefully to ensure that they start on the right size of qualification to fit into their study programme. Some learners might start on the Award size, progress to the Certificate size and then on to the larger Diploma. They may then progress to a BTEC Level 2 qualification. Learners who have a clear idea of the sector they would like to study, could start on the Diploma qualification. All three sizes allow for learners to take complementary qualifications such as maths and English alongside their BTEC Introductory qualification.

It is not advised that learners take two Award or Certificate qualifications from different sectors. If learners want to study across two or more sectors, then you should consider offering a Pearson BTEC Level 1 Introductory Vocational Studies Certificate or Diploma. The Vocational Studies qualifications give learners a flavour of a number of different vocational sectors. When learners are recruited, you need to give them accurate information on the title and focus of the qualification for which they are studying.

### Is there a learner entry requirement?

There are no formal entry requirements but all learners recruited should be able to access a Level 1 programme. As a centre, it is your responsibility to ensure that learners who are recruited make reasonable progress and are likely to achieve at this level.

Learners are most likely to succeed if they:

- have the personal motivation to succeed at this level and to progress to further study and, ultimately, to employment
- are willing to improve their maths and English skills.

### What is involved in becoming an approved centre?

All centres must be approved before they can offer these qualifications, this is so that they are ready to assess learners and so that we can provide the support that it is needed.

Further information is given in *Section 7*.

### What level of sector knowledge is needed to teach these qualifications?

We do not set any requirements for tutors but recommend that centres assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date. This will give learners a rich programme to prepare them for progression.

### What resources are required to deliver these qualifications?

As part of your centre approval you will need to show that the necessary material resources and work spaces are available to deliver the qualifications. For some units, specific resources are required.

### Which modes of delivery can be used for these qualifications?

You are free to deliver BTEC Introductory units using any form of delivery that meets the needs of your learners. We recommend making use of a wide variety of modes, including some direct instruction in classrooms or vocational environments, practical work, group- and peer work, private study and e-learning.

## Support

It is important that you give learners opportunities for learning that are active, engaging and directly relevant to their study. To support you in this, each unit has delivery guidance and suggestions for the summative assessment activity.

### What support is available?

We will provide a generic delivery guide which will give suggestions for how to deliver the core units and the transferable skills across the suite. This will be available to download on our website.

To support you in planning your assessments you will be allocated a Standards Verifier early on in the planning stage. See *Section 5* for further details.

# 5 Assessment

## Introduction

All units in this specification are internally assessed and externally verified.

In administering assessments, you, as the centre, need to be aware of the specific procedures and policies that apply, for example for registration, entries and results. Information with signposting to relevant documents is given in *Section 7*.

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Quality Assurance Handbook*. All members of your assessment team need to refer to this document.

For BTEC Introductory qualifications it is important that you can meet the needs of learners by providing a programme that is practical and which will develop transferable and sector skills in a vocational context. Centres can tailor programmes to meet local needs and use links with local organisations and the wider vocational sector.

We have addressed the need to ensure that the time allocated to final assessment of internal units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

When internal assessment is operated effectively it is challenging, engaging, practical and up to date. It must also be fair to all learners.

## Principles of internal assessment

Our approach to internal assessment for these qualifications will be broadly familiar to experienced centres. It offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, explained in *Section 3*, and the requirements for delivering assessment.

In developing an overall plan for delivery and assessment for the programme you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place.

## Assessment through assignments

For internally-assessed units, the format of assessment is an assignment taken after the content of the unit or part of the unit, has been delivered. An assignment may take a variety of forms, including practical and written types and can be split into tasks. An assignment is a distinct activity completed independently by learners that is separate from teaching, practice, exploration and other activities that learners complete with direction from, and formative assessment by, tutors.

An assessment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that the learner needs to provide. There may be specific observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome based on the assessment criteria.

## Assessment decisions through applying unit-based criteria

Assessment decisions for BTEC Introductory qualifications are based on the specific criteria given in each unit and set at each grade level. To ensure that standards are consistent in the qualification and across the suite as a whole, the criteria for each unit have been defined according to a framework. The way in which individual units are written provides a balance of assessment of understanding, and sector- and transferable skills appropriate to the purpose of qualification.

The assessment criteria for a unit are hierarchical and holistic. For example, if a Merit criterion requires the learner to 'describe' and the related P criterion requires the learner to 'outline', then to satisfy the M criterion a learner will need to cover both 'outline' and 'describe'. The unit assessment grid shows the relationships of the criteria so that assessors can apply all the criteria to the learner's evidence at the same time. In *Appendix 2* we have set out a definition of terms that assessors need to understand.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and therefore the Pass and Merit criteria); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and therefore the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 1 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as having an unclassified grade. See *Section 8* for further information on grading.

## The assessment team

It is important that there is an effective team for internal assessment. There are three key roles involved in implementing assessment processes in your centre, each with different interrelated responsibilities, the roles are listed below. Full information is given in the *Pearson Quality Assurance Handbook*.

- The Lead Internal Verifier (the Lead IV) for the BTEC Introductory suite has overall responsibility for the programme across all sectors delivered in their centre. The Lead IV ensures the record keeping, assessment and internal verification meet our requirements and liaise with our Standards Verifier. The Lead IV registers with Pearson annually. The Lead IV acts as an assessor, supports the rest of the assessment team, makes sure that they have the information they need about our assessment requirements and organises training, making use of our guidance and support materials.
- Internal Verifiers (IVs) oversee all assessment activity in consultation with the Lead IV. They check that assignments and assessment decisions are valid and that they meet our requirements. IVs will be standardised by working with the Lead IV. Normally, IVs are also assessors but they do not verify their own assessments.
- Assessors set or use assignments to assess learners to national standards. Before taking any assessment decisions, assessors participate in standardisation activities led by the Lead IV. They work with the Lead IV and IVs to ensure that the assessment is planned and carried out in line with our requirements.

## **Effective organisation**

Internal assessment needs to be well organised so that the progress of learners can be tracked and so that we can monitor that assessment is being carried out in line with national standards. It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

## **Learner preparation**

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualifications. Learners need to understand how assignments are used, the importance of meeting assignment deadlines, and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme, and how they should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

## Setting effective assignments

### Setting assignments

In setting your assignments, you need to work with the guidance given in the *Essential information for tutors* section of a unit. This section gives you information on assessment decisions, with suggested scenarios for assessments. In designing your own assignment briefs you should bear in mind the following points.

- We recommend that you create a single assignment for the whole unit that incorporates skills and related content. This assignment may be broken into tasks.
- A learning aim must always be assessed as a whole and must not be split into two or more tasks.
- The assignment must be targeted to the learning aims but the learning aims and their associated criteria are not tasks in themselves. Criteria are expressed in terms of the outcome shown in the evidence.
- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.
- As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning aims. The specified teaching content is compulsory. The evidence for assessment need not cover every aspect of the teaching content, as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out one practical performance, or a visit to an organisation, then they will address all the relevant range of content that applies in that instance.

### Providing an assignment brief

A good assignment brief is one that, through providing challenging and realistic tasks, motivates learners to provide appropriate evidence of their ability.

An assignment brief should have:

- a vocational scenario or context, this could be a simple situation or a full, detailed set of vocational requirements that motivates the learner to apply their learning through the assignment
- clear instructions to the learner about what they are required to do, normally that could be set out through a series of tasks
- an audience or purpose for which the evidence is being provided.

## Forms of evidence

BTEC Introductory units allow for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim and the learner being assessed. For most units, the practical demonstration of skills is necessary. The units give you information to suggest what would be suitable forms of evidence and to give learners the opportunity to apply a range of transferable and sector skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

Full definitions of types of assessment are given in *Appendix 2* but some of the main types of assessment are:

- oral or written presentations with assessor questioning
- practical assessments with observation records and supporting evidence
- recordings of role play, interviews and other activity
- work logbooks, reflective journals.

The form(s) of evidence selected must:

- allow the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- allow the learner to produce evidence that is their own independent work
- allow a verifier to independently reassess the learner to check the assessor's decisions.

For example, when you are using performance evidence, you need to consider how supporting evidence can be captured through recordings, photographs or task sheets.

Centres need to take particular care in ensuring that learners produce independent work.

## Making valid assessment decisions

### Authenticity of learner work

Once an assessment has begun, learners must not be given feedback on progress towards fulfilling the targeted criteria.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 6*.

### Making assessment decisions using criteria

Assessors make judgements using the criteria. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive.

Assessors should use the following information and support in reaching assessment decisions:

- the explanation of key terms in *Appendix 1*
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Pass, Merit and Distinction criteria all relate to individual learning aims.

### Dealing with late completion of assignments

Learners must have a clear understanding of the centre policy on completing assignments by the deadlines that you give them. Learners may be given authorised extensions for legitimate reasons, such as illness at the time of submission, in line with your centre policies.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who do not complete assignments by your planned deadline or the authorised extension deadline may not have the opportunity to subsequently resubmit.

### Issuing assessment decisions and feedback

Once the assessment team has completed the assessment process for an assignment, the outcome is a formal assessment decision. This is recorded formally and reported to learners.

The information given to the learner:

- must show the formal decision and how it has been reached, indicating how or where criteria have been met
- may show why attainment against criteria has not been demonstrated
- must not provide feedback on how to improve evidence.



## Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, having met the initial deadline. For example, that the learner has not performed as expected
- making sure that giving a further opportunity can be done in such a way that it does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners
- checking that the assessor considers that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

A resubmission opportunity must not be provided where learners:

- have not completed the assignment by the deadline without the centre's agreement or have submitted work that is not authentic.

A learner who has not achieved the level of performance required to pass the relevant learning aims after resubmission of an assignment may be offered a single retake opportunity using a new assignment. The retake may only be achieved at a pass.

The Lead Internal Verifier must only authorise a retake of an assignment in exceptional circumstances where they believe it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity you should refer to the *BTEC Centre Guide to Assessment*. We provide information on writing assignments for retakes on our website ([www.btec.co.uk/keydocuments](http://www.btec.co.uk/keydocuments)).

## Planning and record keeping

For internal processes to be effective, an assessment team needs to be well organised and keep effective records. The centre will work closely with us so that we can quality assure that national standards are being satisfied.

The Lead IV should have an assessment plan, produced as a spreadsheet. When producing their plan the assessment team may wish to consider:

- the time available to undertake teaching and carry out assessment, taking account of when learners may complete external assessments and when quality assurance will take place
- the completion dates for different assignments
- who is acting as IV for each assignment and the date by which the assignment needs to be verified
- setting an approach to sampling assessor decisions through internal verification that covers all assignments, assessors and a range of learners
- how resubmission dates can be scheduled.

The Lead IV will also maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Quality Assurance Handbook*.

## 6 Administrative arrangements

### Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification. It is of particular value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

### Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal assessment. Refer to our *Information Manual* (available on our website) for information on making registrations for the qualification.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a qualification from a different sector, then you must transfer the learner appropriately.

### Access to assessment

All assessments need to be administered carefully to ensure that all learners are treated fairly, and that results and certification are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires all learners to have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

## Administrative arrangements for internal assessment

### Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in our *Information Manual*. We may ask to audit your records so they must be retained as specified.

### Reasonable adjustments to assessment

A reasonable adjustment is one that is made before a learner takes an assessment to ensure that they have fair access to demonstrate the requirements of the assessments. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally assessed units*.

### Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration in line with the policy.

### Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in our policy *Enquiries and Appeals about Pearson Vocational Qualifications*.

## Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners please see *Centre Guidance: Dealing with Malpractice*, available on our website.

Note that the procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed. There is no external assessment in this qualification.

### Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

### Tutor/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of Centres are requested to inform the Investigations Team by submitting a JCQ M2(a) form (downloadable from [www.jcq.org.uk/malpractice](http://www.jcq.org.uk/malpractice)) with supporting documentation to [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com). Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see 6.15 of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures*.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

## Sanctions and appeals

Where malpractice is proven we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from Heads of Centres (on behalf of learners and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and Appeals* policy, on our website.

In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com) who will inform you of the next steps.

## Certification and results

Once a learner has completed all the required components for a qualification, the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

## Results issue

Learner results will then be issued to centres. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

## Post-assessment services

It is possible to transfer or reopen registration in some circumstances. The *Information Manual* gives further information.

## Additional documents to support centre administration

As an approved centre you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- *Pearson Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *Lead Verifier Reports*: these are produced annually and give feedback on the overall performance of learners.
- *Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- *Regulatory policies*: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
  - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
  - age of learners
  - centre guidance for dealing with malpractice
  - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

## 7 Quality assurance and centre approval

### Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

### Continuing quality assurance and standards verification

We produce the *Pearson Quality Assurance Handbook* on an annual basis. It contains detailed guidance on the quality processes required to underpin robust assessment and internal verification.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Introductory qualifications include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality-assuring its BTEC programmes.



Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for any BTEC Introductory programmes. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

## 8 Understanding the qualification grade

This section explains the rules that we apply in providing an overall qualification grade for each learner. It shows how all the qualifications in this sector are graded.

The final grade awarded for a qualification represents a holistic performance across all of the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units will be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number units, the core units along with the sector units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

### Awarding and reporting for the qualification

The awarding and certification of these qualifications will comply with Ofqual requirements.

#### Eligibility for an award

To achieve any qualification grade, learners must:

- complete and report an outcome for all units within a valid combination (NB: Unclassified (U) is a permitted unit outcome), and
- achieve the minimum number of points at a grade threshold, and
- achieve sufficient Guided Learning Hours at Pass or above, see table below.

Qualification	Required Guided Learning Hours at Pass or above
Award	70
Certificate	140
Diploma	280

It is the responsibility of a centre to ensure that a correct unit combination is adhered to. Learners who do not achieve sufficient points for a Certificate or a Diploma may be eligible to achieve a smaller sized qualification in the same suite provided they have completed the correct combination of units, met the appropriate qualification grade points threshold and have met the requirement for guided learning a Pass or above.

#### Calculation of the qualification grade

The qualification grade is an aggregation of a learner's unit level performance. The BTEC Introductory suite comprises Level 1 qualifications which are awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Award	P to D
Certificate	P to D
Diploma	PP to DD

The *Calculation of Qualification Grade* table, shown further on in this section, indicates the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. In the event of any change, centres will be informed before the start of teaching for the relevant cohort and an updated table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. Our *Information Manual* gives full information of this process.

### Points available for units

The table below shows the number of **points** available for units. For each unit, points are allocated depending on the grade awarded.

	Unit size	
	30 GLH	40 GLH
<b>U</b>	0	0
<b>Pass</b>	6	8
<b>Merit</b>	12	16
<b>Distinction</b>	18	24

### Claiming the qualification grade

Subject to eligibility, Pearson will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant *Calculation of Qualification Grade* table for the cohort

### Calculation of qualification grade

Applicable for registration from 1 September 2019.

Award		Certificate		Diploma	
70 GLH		180 GLH		360 GLH	
Grade	Points threshold	Grade	Points threshold	Grade	Points threshold
U	0	U	0	U	0
P	14	P	36	PP	72
				MP	96
M	22	M	60	MM	120
				DM	158
D	36	D	96	DD	196

The table is subject to review over the lifetime of the qualification. The most up-to-date version will be issued on our website.

## Examples of grade calculations based on table applicable to registrations from September 2019

### Example 1: Achievement of an Award with a D grade

	GL	Grade	Unit points
Unit 1	30	Distinction	18
Unit 7	40	Distinction	24
<b>Totals</b>	<b>70</b>	<b>D</b>	<b>36</b>

The learner has sufficient points for a D grade

### Example 2: Achievement of an Award with a P grade

	GL	Grade	Unit points
Unit 1	30	Pass	6
Unit 7	40	Pass	8
<b>Totals</b>	<b>70</b>	<b>P</b>	<b>14</b>

The learner has met the minimum requirement for 70 GL at Pass or above

The learner has sufficient points for a P grade

### Example 3: An Award graded unclassified

	GL	Grade	Unit points
Unit 1	30	U	0
Unit 7	40	Distinction	24
<b>Totals</b>	<b>70</b>	<b>P</b>	<b>24</b>

The learner has a U in Unit 1

The learner has sufficient points for a M but has not met the minimum requirement for 70 GL

**Example 4: Achievement of a Certificate with a D grade**

	<b>GL</b>	<b>Grade</b>	<b>Unit points</b>
Unit 1	30	Distinction	18
Unit 2	30	Pass	6
Unit 5	40	Distinction	24
Unit 6	40	Distinction	24
Unit 7	40	Distinction	24
<b>Totals</b>	<b>180</b>	<b>D</b>	<b>96</b>

The learner has sufficient points for a D grade

**Example 5: Achievement of a Certificate with a P grade**

	<b>GL</b>	<b>Grade</b>	<b>Unit points</b>
Unit 1	30	U	0
Unit 2	30	Merit	12
Unit 5	40	Pass	8
Unit 6	40	Pass	8
Unit 7	40	Pass	8
<b>Totals</b>	<b>180</b>	<b>P</b>	<b>36</b>

The learner has met the minimum requirement for 140 GL at Pass or above

The learner has sufficient points for a P grade

### Example 6: A Certificate graded Unclassified

	GL	Grade	Unit points
Unit 1	30	U	0
Unit 2	30	Distinction	18
Unit 5	40	Distinction	16
Unit 6	40	U	0
Unit 7	40	Pass	8
<b>Totals</b>	<b>180</b>	<b>U</b>	<b>42</b>

The learner has a U in Units 1 and 6

The learner has sufficient points for M but has not met the minimum requirement for 140 GL at Pass or above

### Example 7: A Diploma graded Unclassified

	GL	Grade	Unit points
Unit 1	30	U	0
Unit 2	30	Distinction	18
Unit 3	30	Pass	6
Unit 4	30	Pass	6
Unit 5	40	Pass	8
Unit 6	40	U	0
Unit 7	40	U	0
Unit 8	40	Distinction	24
Unit 9	40	Distinction	24
Unit 10	40	Distinction	24
<b>Totals</b>	<b>360</b>	<b>U</b>	<b>110</b>

The learner has not met the minimum requirement for 280 GL at Pass or above

The learner has sufficient points for MP but has not met the minimum requirement for 280 GL at Pass or above

**Example 8: Achievement of a Diploma with a DD grade**

	<b>GL</b>	<b>Grade</b>	<b>Unit points</b>
Unit 1	30	Merit	12
Unit 2	30	Merit	12
Unit 3	30	Distinction	18
Unit 4	30	Distinction	18
Unit 5	40	Distinction	24
Unit 6	40	Distinction	24
Unit 7	40	Distinction	24
Unit 8	40	Distinction	24
Unit 9	40	Distinction	24
Unit 10	40	Merit	16
<b>Totals</b>	<b>360</b>	<b>DD</b>	<b>196</b>

The learner has sufficient points for a DD grade

**Example 9: Achievement of a Diploma with a PP grade**

	<b>GL</b>	<b>Grade</b>	<b>Unit points</b>
Unit 1	30	U	0
Unit 2	30	Merit	12
Unit 3	30	Pass	6
Unit 4	30	Pass	6
Unit 5	40	U	0
Unit 6	40	Pass	8
Unit 7	40	Pass	8
Unit 8	40	Pass	8
Unit 9	40	Merit	16
Unit 10	40	Pass	8
<b>Totals</b>	<b>360</b>	<b>PP</b>	<b>72</b>

The learner has met the minimum requirement for 280 GL at Pass or above

The learner has sufficient points for a PP grade

## 9 Resources and support

Our aim is to give you support to enable you to deliver BTEC Introductory qualifications with confidence. You will find resources to support teaching and learning, and professional development on our website.

### Support for setting up your course and preparing to teach

#### Delivery Guide

The free guide gives you important advice on how to choose the right course for your learners and how to ensure you are fully prepared to deliver the course. It explains the key features of BTEC Introductory qualifications (for example how to deliver and assess transferable and sector skills). It covers guidance on assessment and quality assurance and includes teaching tips and ideas, assessment preparation and suggestions for further resources.

### Support for teaching and learning

Pearson Learning Services provides a range of engaging resources to support BTEC qualifications, including:

- textbooks in e-book and print formats
- teaching and assessment packs, including e-learning materials via the Active Learn Digital Service.

Teaching and learning resources are also available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources can be found on our website.

### Support for assessment

#### Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences.



## Training and support from Pearson

### People to talk to

There are lots of people who can support you and give you advice and guidance on delivering your BTEC Nationals. They include:

- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, and support you in preparing learner work and providing quality assurance through sampling
- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment
- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events
- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

### Training and professional development

We provide a range of training and professional development events to support the introduction, delivery, assessment and administration of BTEC Introductory qualifications. The sector-specific events, developed and delivered by specialists, are available both face to face and online.

# Appendix 1 Glossary of terms used for internally-assessed units

This is a summary of the key terms used to define the requirements in the units.

Term	Definition
Accurate	Perform processes and procedures without error.
Basic	Considering the fundamentals of a topic.
Coherent	Logically consistent.
Collaborate	Work jointly with others.
Competent	Having the necessary knowledge or skill to do something suitably or sufficiently in amount or extent.
Comprehensive	Full, covering a range of factors.
Confident	Demonstrate secure application of skills or processes.
Consideration	Importance of the topic in hand.
Consistent	Able to reliably repeat an action that progresses towards achieving an aim.
Creative	Using techniques, equipment and processes to express ideas or feelings in new ways.
Demonstrate	Carry out and apply knowledge, understanding and/or skills in a practical situation.
Describe	Give a clear account that includes all the relevant features and characteristics – ‘painting a picture with words’.
Effective	Show control over techniques, equipment and processes to efficiently meet the details and broad aims of a requirement.
Explain	Work shows clear details and gives reasons and/or evidence to support an opinion, view or argument. Learners can show comprehension of origins, functions and objectives of a subject and its suitability for purpose.
Flexible	Change to suit the situation.
Identify	Indicate the main features or purpose of something by recognising it and/or being able to discern and understand facts or qualities.
Insightful	Being perceptive and discerning.
Limited	Restricted to basic coverage
Outline	Learners’ work, performance or practice provides a summary or overview or a brief description.
Realistic	Based on something that is real.
Reflect	Think carefully and review information and/or performance – includes articulating ideas, concepts, activities, findings or features.

<b>Term</b>	<b>Definition</b>
Relevant	Connected to the matter in hand.
Review	Assess formally, appraising existing information or prior events with the intention of instituting change if necessary.
Show	Learners' work, performance or practice presents evidence using knowledge, understanding and skills.
State	Learners can express the condition of, or facts about something definitely or clearly.
Successful	Accomplishment of the desired aim or task.
Summarise	Express the most important facts or ideas about something or someone in a short and clear format.

This is a key summary of the types of evidence used for BTEC Introductory Suite of qualifications.

<b>Type of evidence</b>	<b>Definition and purpose</b>
Development log	A record kept by learners to show the process of development. Used to show method, self-management and skill development.
Observation records	An observation record is used to provide a formal record of an assessor's judgement of learners' performance.
Performance	A defined and constrained opportunity to perform, to show skills in a structured context and where the focus is on the skills/process rather than the specific outcome.
Plan	A proposal that gives details for doing or achieving something.
Review	A reflective account of an activity or performance.

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