



# **Assessment Guidance for SVQ 4 Business and Administration SCQF level 7 (GA3Y 24)**

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# History of changes

It is anticipated that changes will take place during the life of the qualification, and this section will record these changes. This document is the latest version and incorporates the changes summarised below.

Version Number	Description	Date	Authorised by
2	Page 53 — Change to Unit code for S407. Page 64 — Change to Unit code for S418.	May 2011	Qualifications Officer
3	Minor changes made to document.	July 2013	Qualifications Officer
4	SCQF information added.	October 2013	Qualifications Officer

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# About this guide

This guide provides some practical examples of how to assess your candidates for **SVQ 4 Business and Administration SCQF level 7**. You may be able to think of other ways of assessing your candidates and recording your decisions about their competence.

Using assessments based on these examples does not guarantee successful verification — it is still your responsibility to ensure that internal quality assurance procedures are followed.

# Introduction

This document has been provided to assist assessors and internal verifiers with the delivery of **SVQ 4 Business and Administration SCQF level 7**.

It should be noted that this document will be updated throughout periodically in line with incremental change.

Whilst the guidance contained in this document is not mandatory, it illustrates the standard and range of evidence the External Verifier expects to see.

## About SVQs and the SCQF

Scottish Vocational Qualifications (SVQs) are work-based qualifications which set the level of occupational competence for each sector of the economy and are usually delivered in the workplace or in partnership with a college or other training provider. The qualifications have been designed by standards-setting bodies made up of experienced practitioners who represent employers, professional bodies, trade unions, education and voluntary organisations.

Each standards-setting body is responsible for developing national standards which define *what* employees (or potential employees) must be able to do, *how well*, and *in what circumstances*, to show that they are competent in their work.

Each SVQ which a standards-setting body develops has to fit into a broad framework which allows qualifications in the UK and throughout Europe to be compared.

There are SVQs for nearly all occupations in Scotland and they are available at SVQ levels 1–5. SVQs are currently notionally placed in the SCQF as the individual SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ. SVQs are a means of recognising the skills and knowledge people need in employment, ie job competence. Successful completion of an SVQ provides clear evidence that the learner works to nationally recognised occupational standards.

Each Unit defines one aspect of a job or work-role, and says what it is to be competent in that aspect of the job. To be awarded a full SVQ, learners must achieve each of the SVQ Units which make it up by demonstrating that they are competent in that aspect of the job. The Units which make up the SVQ can also be taken as freestanding awards. Some SVQs or SVQ Units are incorporated into other awards or programmes including HNCs and Modern Apprenticeships.

## Explanation of levels

- SVQ 1** Competence involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.
- SVQ 2** Competence involves the application of knowledge and skills in a significant range of varied work activities, performed in a variety of contexts. At this level, there will be activities, which are complex or non-routine and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
- SVQ 3** Competence involves the application of knowledge and skills in a broad range of varied work activities, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often present.
- SVQ 4** Competence involves the application of knowledge and skills in a broad range of complex technical or professional work activities, performed in a wide variety of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
- SVQ 5** Competence involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Very substantial personal autonomy and often significant responsibility for the work of others and for the allocation of substantial resources feature strongly, as do personal accountability.

For further information on SCQF go to [www.scqf.org.uk](http://www.scqf.org.uk).

# Structure of the SVQ

This section lists the Units which form SVQ 4 Business and Administration SCQF level 7.

## Qualification structure

To achieve the SVQ, you must complete **eight** Units in total.

All three mandatory Units must be completed and at least three Units from **Group A**, the remaining two Units may be selected from **Group A** or **Group B**.

### SVQ 4 Business and Administration SCQF level 7 (GA3Y 24)

#### Mandatory Units (all three Units must be completed)

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FE74 04	7	5	S401	Manage and be Accountable for Own Performance in a Business Environment
FE75 04	8	7	S402	Manage Work in a Business Environment
FE76 04	7	3	S412	Manage Communication in a Business Environment

#### Optional Units

##### Group A (at least three Units must be completed)

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
<b>B1: Work Responsibilities</b>				
FE12 04	8	6	S403	Evaluate and Solve Business Problems
FE13 04	7	4	S404	Make Decisions in a Business Environment
FE14 04	8	7	S405	Negotiate in a Business Environment
<b>B2: Business Support Services</b>				
FE15 04	7	6	S406	Manage an Office Facility
FE16 04	8	8	S407	Propose and Design Administrative Services
FE17 04	8	6	S408	Prepare, Co-ordinate and Monitor Operational Plans

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FE18 04	7	7	S409	Implement, Monitor and Maintain Administrative Services
<b>B3: Project Management</b>				
FE19 04	8	10	S410	Plan, Run and Evaluate Projects <sup>a</sup>
<b>B4: Events and Meetings</b>				
FE1A 04	8	4	S411	Chair Meetings
<b>B5: Business Resources</b>				
FE1C 04	7	5	S415	Prepare Specifications for Contracts
FE1D 04	7	5	S416	Manage Budgets <sup>b</sup>
FE1E 04	8	6	S417	Invite Tenders and Select Contractors
FE1F 04	8	6	S418	Monitor and Evaluate Contracts
<b>B6: Innovation and Change</b>				
FE1G 04	8	6	S419	Implement and Evaluate Innovation in a Business Environment
FE1H 04	8	6	S420	Plan Change for a Team <sup>d</sup>
FE1J 04	9	6	S421	Plan Change Across Teams <sup>d</sup>
FE1K 04	9	6	S422	Implement, Monitor and Review Change
<b>B7: Manage Information and Data</b>				
FE1L 04	8	7	S413	Design and Develop Information Systems <sup>c</sup>
FE1M 04	8	6	S414	Manage and Evaluate Information Systems
<b>B8: Business Resources</b>				
F2H7 04	8	9	S424	Mange Physical Resources
F2H3 04	8	4	S425	Manage the Environmental Impact of Your Work
DR7K 04			S426	Recruit, Select and Keep Colleagues
DR73 04	6	9	S427	Provide Leadership for Your Team
DR75 04	8	9	S428	Provide Leadership in Your Area of Responsibility
DR7C 04	8	11	S429	Provide Learning Opportunities for Colleagues
DP7M 04	10	12	S430	Develop Productive Working Relationships with Colleagues and Stakeholders

**Group B (two Units can be selected)**

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
<b>C1: Project Management</b>				
FE09 04	6	5	S324	Contribute to Running a Project <sup>a</sup>
<b>C2: Events and Meetings</b>				
FE0T 04	6	8	S319	Organise and Co-ordinate Events
FE0V 04	6	5	S320	Plan and Organise Meetings
FE0W 04	6	5	S321	Organise Business Travel or Accommodation
<b>C3: Customer Service</b>				
FE0A 04	6	3	S325	Deliver, Monitor and Evaluate Customer Service to Internal Customers
FE0C 04	6	3	S326	Deliver, Monitor and Evaluate Customer Service to External Customers
<b>C4: Communications</b>				
FE0D 04	6	3	S309	Develop a Presentation
FE0E 04	6	3	S310	Deliver a Presentation
<b>C5: Manage Information and Data</b>				
FE0F 04	6	7	S315	Support the Design and Development of Information Systems <sup>c</sup>
FE0G 04	6	7	S316	Monitor Information Systems
FE0H 04	6	6	S317	Analyse and Report Data
<b>C6: Business Resources</b>				
FE0J 04	7	5	S318	Order Products and Services
FE0K 04	6	4	S327	Agree a Budget <sup>b</sup>

A maximum of two Units only can be selected from Groups B13: IT, C11: IT or C12: Finance.

Either Unit S410 or S324 may be selected but not both. <sup>a</sup>

Either Unit S416 or S327 may be selected. <sup>b</sup>

Either Unit S413 or S315 may be selected. <sup>c</sup>

Either Unit S420 or S421 may be selected. <sup>d</sup>

Each Unit contains guidance relating to the following aspects of each Unit:

- ◆ A general overview of each Unit
- ◆ Guidance on types of evidence
- ◆ Possible sources of evidence

## **Links to Core Units**

The document aims to support and exemplify the good practice of using the optional Units to generate evidence for the core Units.

The guidance given in the document is not intended to be prescriptive — there may very well be other evidence appropriate to the job role of the candidate.

This evidence may provide links to other Units.

# Key Terminology and Guide to Best Practice

## **Performance evidence**

This is first hand evidence of how a candidate works in relation to the standards. It includes the output of performance (work products) and observation of performance. The use of performance evidence is the principal method of demonstrating valid and reliable competence.

## **Assessor observation**

Observation of the candidate in the workplace — carried out by a qualified and occupationally competent assessor. This evidence is both valuable and reliable. At the right or left hand side of each observation record, assessors should reference the task being observed to the performance indicators. This indication is a crucial part of the assessment process and is an essential aid to the internal verification process. An observation should contain information about the context of the assessment.

## **Work products**

Work products are also valuable and reliable items of performance evidence. Work products should be annotated to place the evidence in context. This annotation could be recorded on a storyboard, written on the evidence or within a professional discussion.

## **Supporting evidence**

This evidence supports the key performance evidence. Supporting evidence includes: questioning, professional discussion and witness testimony. Supporting evidence plays an important role in the triangulation of evidence.

## **Questioning**

Questioning is normally used to fill knowledge gaps. This includes both written and oral questioning. Responses to oral questions should be recorded. Much of the knowledge will be covered by performance evidence and additional written or oral questioning may not be required. If questions are required they may be asked in the form of written or oral questions. Assessors could ask oral questions during an observation, during a professional discussion or as work product is being considered by the assessor. The assessor should use his/her judgement to decide the most appropriate opportunity to collect this type of evidence.

## **Professional discussion**

Professional discussions are structured, well planned, in depth discussions recorded in writing by the assessor or captured on audio or digital video.

## **Witness testimony**

This is a written confirmation by a colleague or line manager. This may be a separate document or a short statement written on a piece of work product or as part of an observation. Witness testimony can be used to support the validity, authenticity, currency and reliability of the evidence. It can also be used to highlight competence of a candidate performing a task over a period of time.

## **Triangulation**

Combining different types of evidence — performance evidence and supporting evidence — to ensure authenticity, validity, sufficiency, currency and reliability. Triangulation will also help ensure consistent performance over time.

## **How much is enough evidence?**

The evidence presented against each Unit must clearly demonstrate the candidate's ability to perform the activity competently across a breadth of scope consistently to the required standard over time.

## **Holistic assessment**

Evidence should be assessed using a holistic approach. Evidence presented against one Unit may fulfil parts of another Unit and may be cross-referenced against as many Units as applicable. Many of the Units in the SVQ are interrelated and evidence naturally meets the PIs of other Units. Using a holistic approach means that the assessment process is streamlined and avoids duplication of assessment. It provides a rigorous approach to assessment and allows evidence to be drawn from a range of activities which more naturally falls from a candidate performing their job role, helping ensure breadth of scope and competence over time without over-assessing the candidate in a particular area.

## **Simulation**

Whilst permissible in non-imported Units, simulation should always be used as a last resort and should be regarded as a way to fill gaps rather than evidence complete Units. If a Unit or any part of a Unit is simulated it must be undertaken in a 'realistic working environment' (RWE). Units which have been imported into the Business and Administration SVQ must be assessed in compliance with their relevant assessment strategy, the Unit overview will state if a Unit is imported. Simulation can be used where candidates face barriers to gather evidence through normal workplace activity (eg where a customer service complaint does not naturally occur).

The RWE must replicate the key characteristics of the workplace in which the skill to be assessed is normally employed. This means that the office surroundings must closely resemble a working office environment and the candidate should encounter the usual range of office equipment and furnishings. Whilst undergoing assessment the usual interruptions, time pressure and work related problems should occur and the candidate should be fully accountable for the work they are producing. It is not acceptable for a candidate to sit quietly in a corner and work through an exercise in a training room. The content of the simulation should be of appropriate complexity to the level of the Unit being undertaken and produced within acceptable timescales

External Verifiers will expect to see triangulation of evidence in the portfolio and therefore that a good balance of different types of evidence has been achieved that clearly demonstrates the candidate has the necessary workplace competence.

### **Separating training from assessment**

Materials used for training, or evidence of the outcomes of training, are not evidence of competence and have no place in a portfolio of evidence of candidate competence. Only assessed evidence of competence of the candidate should be presented in the SVQ portfolio.

### **Use of confidential information as evidence**

Some Units naturally rely on confidential and sensitive work product to confirm competence, where this is used steps must be taken to ensure the content is redacted. For some Units there may be a bulk of sensitive or confidential information where it may be inappropriate to redact the content. In these instances it may be more appropriate to consider sign-posting this evidence in the candidate portfolio and leaving the evidence in situ. Where this is used assessors must ensure that a clear and detailed explanation of the content of evidence is included in the portfolio together with details of where the original evidence is to be found (eg full personnel records maintained by the candidate which include updates of personal details, grievance, disciplinary, training records, holiday and sickness can be found in the filing cabinet in the Personnel Office).

This in situ evidence must be available to the internal verifier and External Verifier when the Unit is selected for verification. If you are using this for any candidates, this must be discussed with the External Verifier at the visit planning stage so that suitable arrangements can be made prior to the visit if the candidate's portfolio is selected as part of the External Verifier's sample.

### **Units with WPM**

Some Units incorporate a requirement for candidates to input text or take shorthand at a relevant rate in words per minute. It would be best practice to measure this speed using a timed exercise. The word count is based on five keystrokes per word with the candidate input being measured over a five minute period with no more than five input errors. Where a candidate makes more than five errors in completing this exercise, a reassessment needs to take place.

# Mandatory Units

# **Unit S401: Manage and be Accountable for Own Performance in a Business Environment**

***SQA Code FE74 04***

## **General Overview**

This mandatory Unit is about accepting responsibility for your own work and its delivery as well as improving your own performance.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

## **Performance Indicators**

### **Plan and be accountable for your work**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Work diaries
- ◆ Action plans
- ◆ To do lists
- ◆ Personal Development Plan (PDP)
- ◆ Continuous Professional Development Plan (CPD)
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Appraisals
- ◆ Reviews
- ◆ Reflect on and learn from mistakes
- ◆ Resource plan
- ◆ Risk assessment
- ◆ Targets
- ◆ Budgets
- ◆ Reports
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Behave in a way that supports effective working**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Personal Development Plan (PDP)
- ◆ Continuous Professional Development Plan (CPD)
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Appraisals
- ◆ Reviews
- ◆ Change management: development records, implementation plans, monitoring records and evaluation reports
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Improve your own performance**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Personal Development Plan (PDP)
- ◆ Continuous Professional Development Plan (CPD)
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Appraisals
- ◆ Reviews
- ◆ Training plans
- ◆ Action plans
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S402: Manage Work in a Business Environment

**SQA Code FE75 04**

## **General Overview**

This mandatory Unit is about working effectively within your organisation, supporting its purpose and values, supporting sustainability, respecting diversity, protecting security and confidentiality and managing risk.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

## **Performance Indicators**

### **Work to achieve your organisation's purpose and values**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ A description of your organisation including its mission, values and purpose
- ◆ Details of the individuals (internal and external) that the candidate works with
- ◆ Job description detailing role and responsibilities
- ◆ A diagram of the candidate's role set
- ◆ The decision-making responsibilities of the candidate
- ◆ Details of the decision-making processes that exist and the line management responsibilities and relationships within the candidate's organisation
- ◆ The policies, procedures, systems and values of your organisation that are relevant to your job
- ◆ Evidence of any improvements made to objectives, policies, systems, procedures and values
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Support sustainability**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Organisational policies and procedures supporting sustainability
- ◆ Induction checklists
- ◆ Procedures for the maintenance of equipment established by the candidate
- ◆ Technology efficiency reviews
- ◆ Office equipment maintenance records
- ◆ Office equipment reviews and evaluations
- ◆ Office waste reviews and evaluations
- ◆ Office waste monitoring records
- ◆ Team development plans
- ◆ Training programme
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Personal Development Plans (PDP)
- ◆ Continuous improvement records
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Support diversity**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Organisational policies and procedures supporting diversity
- ◆ Induction checklists
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Training records
- ◆ Recruitment action plans
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Maintain security and confidentiality**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Organisational policies and procedures in relation to the security of property and confidentiality of information
- ◆ Risk assessments
- ◆ System control records
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Security records
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Assess and manage risk**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Risk assessments
- ◆ Risk management records
- ◆ Identification of hazards
- ◆ Action plans
- ◆ Implementation plans
- ◆ Monitoring records
- ◆ Evaluation reports
- ◆ Minutes of one-to-one, team and management meetings
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S412: Manage Communication in a Business Environment

**SQA Code FE76 04**

## **General Overview**

This mandatory Unit is about communicating and persuading in writing and verbally in a business environment.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

## **Performance Indicators**

### **Plan communication**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Details of the methods of communication and situations in which the candidate has communicated
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### **Communicate in writing**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Evidence of the candidate's communications in writing appropriate to the different audiences, purposes and communication media
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### **Communicate verbally**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Evidence of the candidate's verbal communications appropriate to the different audiences, purposes and communication media
- ◆ Feedback
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Optional Units

# Level 3

# Unit S309: Develop a Presentation

**SQA Code FE0D 04**

## General Overview

This Unit is about researching, planning and preparing a presentation for specific audiences.

This involves:

- ◆ Agreeing the purpose, content, style and time of presentation and who the audience will be
- ◆ Researching and planning the presentation
- ◆ Choosing the equipment required to deliver the presentation
- ◆ Preparing the presentation
- ◆ Estimating how long the presentation will last
- ◆ Obtaining feedback on the presentation and making any necessary adjustments
- ◆ Producing presentation handouts
- ◆ Reflecting on feedback obtained and identifying learning points

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Research results
- ◆ Presentations
- ◆ Feedback of presentations
- ◆ Presentation handouts
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S310: Deliver a Presentation

**SQA Code FE0E 04**

## General Overview

This Unit is about preparing for, delivering and evaluating a formal presentation.

This involves:

- ◆ Choosing equipment and planning how to use the equipment's features
- ◆ Developing contingency plans
- ◆ Practicing and timing the delivery of the presentation
- ◆ Obtaining feedback on the presentation and making necessary adjustments
- ◆ Making sure the equipment and resources are in working order
- ◆ Making sure the audience receive presentation materials
- ◆ Introducing self to audience and stating the aims of the presentation
- ◆ Addressing the audience by speaking clearly and confidently
- ◆ Using equipment to enhance the presentation and deal with any problems that may occur
- ◆ Varying voice tone, pace and volume to emphasise points and maintain audience interest
- ◆ Using body language to reinforce message
- ◆ Gauging audience reaction during the presentation
- ◆ Summarise the key points
- ◆ Providing the opportunities to ask questions
- ◆ Listening carefully to questions and respond in a way that meets the audience's needs
- ◆ Collecting feedback on the presentation
- ◆ Reflecting on own performance and identifying changes that will improve future presentations
- ◆ Evaluating the presentation and identifying changes that will improve presentations

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Audience handouts
- ◆ Feedback of presentations
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S315: Support the Design and Development of Information Systems

***SQA Code FE0F 04***

## **General Overview**

This Unit is about contributing to the design and supporting the development of information systems to meet users' needs.

This involves:

- ◆ Identifying the information that will be managed within the system
- ◆ Identifying the resources required and available to implement the system
- ◆ Contributing to the design of the system specification
- ◆ Supporting the development of the information system
- ◆ Supporting the testing of the information system
- ◆ Resolving faults within limits of own authority

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Design of system specification
- ◆ Example of information system that meets the specification
- ◆ Letters, memos, e-mails
- ◆ Minutes of meetings/details of discussions
- ◆ System test documentation
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S316: Monitor Information Systems

**SQA Code FE0G 04**

## General Overview

This Unit is about maintaining and monitoring information systems to meet agreed specifications within legislation and organisational requirements.

This involves:

- ◆ Identifying the information to be monitored and the resources available
- ◆ Providing training and ongoing support to users
- ◆ Maintaining and updating the information system
- ◆ Monitoring the use of the information system
- ◆ Resolving problems when they occur
- ◆ Reviewing and further development of the information system
- ◆ Making sure legal and organisational requirements are followed

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Evidence of use of information system
- ◆ Evidence of updating the information system
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S317: Analyse and Report Data

**SQA Code FE0H 04**

## General Overview

This Unit is about selecting, organising, analysing and reporting data.

This involves:

- ◆ Selecting relevant, valid and reliable data for analysis
- ◆ Organising data for analysis
- ◆ Applying analysis and evaluation techniques and producing accurate, unbiased results and conclusions
- ◆ Getting feedback on what you have found and presenting data on time

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Copy of data for analysis
- ◆ Accurate unbiased results of analysis
- ◆ Feedback on analysis
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Letters, memos and e-mails
- ◆ Tracker spreadsheets
- ◆ Minutes of meetings
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S318: Order Products and Services

**SQA Code FE0J 04**

## General Overview

This Unit is about identifying and obtaining relevant products and services to meet agreed specifications as negotiated with suppliers to achieve best value for money.

This involves:

- ◆ Keeping up-to date with products and services related to candidate's own work area
- ◆ Developing and agreeing a budget and specification for products to be ordered
- ◆ Identifying quality products that meet the specification
- ◆ Identifying products which represent value for money
- ◆ Procuring products following organisational procedures
- ◆ Negotiating with suppliers to reach an agreement which offers value for money
- ◆ Agree a contract for the product
- ◆ Creating and maintaining partnerships with suppliers
- ◆ Monitoring the performance of suppliers
- ◆ Following procedures to deal with problems
- ◆ Monitoring and evaluating the procurement procedures
- ◆ Taking action to improve efficiency and obtain better value for money

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Budget and specification for products to be ordered
- ◆ Letters, e-mails of negotiations with suppliers
- ◆ Copy of contract
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S319: Organise and Co-ordinate Events

**SQA Code FE0T 04**

## General Overview

This Unit is about agreeing a brief and budget for organising an event and to decide the operational activities and technical requirements to deliver the event.

This involves:

### Before the event

- ◆ Agreeing the event brief and budget
- ◆ Agreeing a plan for the event which will meet agreed objectives and address identified risks and contingencies
- ◆ Identifying and agreeing resources and support needed
- ◆ Identifying and costing suitable venues
- ◆ Making sure all relevant legal and contractual requirements are met
- ◆ Making sure the event complies with all relevant health and safety and security requirements
- ◆ Liaising with the venue to confirm event requirements
- ◆ Making sure invitations are sent out to delegates
- ◆ Managing resources and the production of event materials
- ◆ Managing delegate responses
- ◆ Preparing joining instructions and event materials to be sent to delegates
- ◆ Making arrangements for rehearsals, if required, and make sure that the event runs smoothly
- ◆ Making sure all those involved are briefed and trained to fulfil their roles
- ◆ Delegating functions to the event team

### At the event

- ◆ Preparing the venue and making sure all necessary resources are in place
- ◆ Co-ordinating activities and resources during the event
- ◆ Identifying where further learning and development could improve performance
- ◆ Helping delegates to feel welcome
- ◆ Responding to delegates' needs
- ◆ Resolving problems in a timely manner
- ◆ Overseeing the work of key staff during the event
- ◆ Monitoring compliance with relevant health, safety and security requirements
- ◆ Liaising with venue management to make sure resources are in place

## **After the event**

- ◆ Clearing and vacating the venue
- ◆ Preparing and circulating papers
- ◆ Reconciling accounts to budgets
- ◆ Seeking and collecting feedback from those involved in the event
- ◆ Analysing the feedback and sharing the analysis
- ◆ Agreeing key learning points and use these to improve the running of future events

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Event brief
- ◆ Plan for the event
- ◆ Costing for venues
- ◆ Comparison of venues and facilities
- ◆ Delegate list for invitation
- ◆ Invitations
- ◆ Delegate responses
- ◆ Analysis of delegate requirements
- ◆ Joining instructions and event materials
- ◆ Papers to be circulated
- ◆ Accounts relating to the event
- ◆ Feedback and analysis
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S320: Plan and Organise Meetings

**SQA Code FE0V 04**

## General Overview

This Unit is about planning and organising meetings, ensuring the necessary activities are carried out before, during and after the meeting.

This involves:

### Before the event

- ◆ Planning and agreeing the meeting brief
- ◆ Agreeing a budget for the meeting
- ◆ Organising and confirming venue, equipment and catering requirements
- ◆ Agreeing and preparing agenda and meeting papers
- ◆ Inviting attendees, confirming attendance and identifying any special arrangements
- ◆ Making sure attendees needs are met
- ◆ Collating and dispatching papers for the meeting within agreed timescales
- ◆ Making sure the chair receives an appropriate briefing
- ◆ Arranging the equipment and layout of the room
- ◆ Arranging catering
- ◆ Making sure somebody has been nominated to take the minutes

### At the meeting

- ◆ Making sure attendees are welcomed and receive suitable refreshments
- ◆ Making sure attendees have the papers and other resources they need
- ◆ Providing information, advice and support when required

### After the event

- ◆ Evaluating and maintaining a record of external services
- ◆ Collecting and evaluating feedback from the meeting
- ◆ Agreeing learning points and use these to improve the organisation of future meetings

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used.

Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Meeting brief
- ◆ Budget
- ◆ Costing for venues
- ◆ Comparison of venues and facilities
- ◆ Attendee list for invitation
- ◆ Invitations
- ◆ Attendee responses
- ◆ Analysis of delegate requirements
- ◆ Letters, e-mails, memos
- ◆ Meeting paper
- ◆ Evaluations
- ◆ Feedback
- ◆ Record of external services
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S321: Organise Business Travel or Accommodation

**SQA Code FE0W 04**

## General Overview

This Unit is about researching, organising and agreeing arrangements for travel or accommodation to make sure they meet the brief and agreed budget.

This involves:

- ◆ Confirming travel or accommodation requirements
- ◆ Checking draft itinerary and schedule with the traveller
- ◆ Researching and booking travel arrangements or accommodation
- ◆ Obtaining foreign currency, insurance and visas, if required
- ◆ Obtaining and collating documents/information for travel or accommodation
- ◆ Maintaining records of travel or accommodation
- ◆ Arranging payment facilities for travel or accommodation
- ◆ Following correct procedures when there are problems with travel or accommodation
- ◆ Providing the traveller with an itinerary, documents and information in good time
- ◆ Confirming with the traveller that itinerary, documents meet requirements
- ◆ Evaluating and maintaining a record of external services used

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Copy of travel or accommodation and budget requirements
- ◆ Draft itinerary
- ◆ Copy of booked travel or accommodation arrangements
- ◆ Copy of foreign currency receipt, insurance and visa, if required
- ◆ Copy of payment information for travel and/or accommodation
- ◆ Copy of itinerary
- ◆ Attendee responses
- ◆ Letters, e-mails, memos
- ◆ Research analysis notes
- ◆ Feedback from traveller evaluations
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S324: Contribute to Running a Project

**SQA Code FE09 04**

## General Overview

This Unit is about contributing to project planning and supporting the implementation and monitoring of projects to achieve planned outcomes.

This involves:

### Contributing to project planning

- ◆ Identifying all stakeholders involved in the project
- ◆ Confirming the purpose of the project with all stakeholders
- ◆ Confirming the project scope, timescale, aims and objectives
- ◆ Contributing to the preparation of a project specification
- ◆ Confirming the resources needed for the project

### Running the project

- ◆ Implementing and monitoring the project to meet the agreed budget and timescales
- ◆ Communicating with all those involved in the project
- ◆ Seeking advice in response to unexpected events
- ◆ Keeping record of all project activity
- ◆ Providing interim reports on project progress
- ◆ Achieving required outcomes on time and to budget

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, e-mails, memos
- ◆ Minutes of the meeting
- ◆ Project specifications
- ◆ Records of all project activity including budgets and timescales
- ◆ Interim reports
- ◆ Appraisals, reviews
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S325: Deliver, Monitor and Evaluate Customer Service to Internal Customers

**SQA Code FE0A 04**

## General Overview

This Unit is about delivering, monitoring, evaluating and improving services to meet internal customer needs.

This involves:

### Identifying customer needs and expectations

- ◆ Building positive working relationships with internal customers
- ◆ Managing expectations of internal customers to make sure they are realistic
- ◆ Identifying and confirming customer needs
- ◆ Agreeing timescales and quality standards with internal customers

### Delivering customer services

- ◆ Providing services to agreed timescales and quality standards and follow procedures if these are not achieved
- ◆ Checking internal customer needs and expectations are met
- ◆ Following the correct procedures to handle complaints in a professional manner and to a given timescale
- ◆ Monitoring and evaluating internal customer services
- ◆ Obtaining and recording internal customer feedback
- ◆ Analysing and evaluating internal customer feedback
- ◆ Taking action to improve service to internal customers

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, e-mails, memos
- ◆ Department contact logs
- ◆ Feedback analysis
- ◆ Internal customer feedback
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S326: Deliver, Monitor and Evaluate Customer Service to External Customers

***SQA Code FE0C 04***

## **General Overview**

This Unit is about delivering, monitoring, evaluating and improving services to meet external customer needs.

This involves:

### **Identifying customer needs and expectations**

- ◆ Building positive working relationships with external customers
- ◆ Managing expectations of external customers to make sure they are realistic
- ◆ Identifying and confirming customer needs
- ◆ Agreeing timescales and quality standards with internal customers

### **Delivering customer services**

- ◆ Providing services to agreed timescales and quality standards and follow procedures if these are not achieved
- ◆ Checking external customer needs and expectations are met
- ◆ Following the correct procedures to handle complaints in a professional manner and to a given timescale
- ◆ Monitoring and evaluating external customer services
- ◆ Obtaining and recording external customer feedback
- ◆ Analysing and evaluating external customer feedback
- ◆ Taking action to improve service to external customers

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, e-mails, memos
- ◆ Customer contact logs
- ◆ Customer feedback analysis records
- ◆ External customer feedback
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S327: Agree a Budget

**SQA Code FE0K 04**

## General overview

This Unit is about identifying and negotiating the financial resources required to agree a budget.

This involves:

- ◆ Identifying the financial resources needed to meet goals and objectives
- ◆ Evaluating and justifying costs and associated risks
- ◆ Planning a draft budget and negotiating and agreeing the budget with appropriate persons

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Plan a draft budget
- ◆ Copy of actual budget
- ◆ Letters, e-mails of negotiations with suppliers
- ◆ Minutes of meeting
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Level 4

# Unit S403: Evaluate and Solve Business Problems

**SQA Code FE12 04**

## General Overview

This optional Unit is about identifying, analysing, assessing, planning, solving and evaluating business problems.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ The organisation's mission and objectives
- ◆ Correspondence/minutes of meetings discussing business problem(s)
- ◆ Record of prioritising business problems in relation to importance/complexity/impact/urgency
- ◆ Communication records
- ◆ Risk assessments
- ◆ Strengths, weaknesses, opportunities and threats (SWOT) analysis
- ◆ Political, environmental, social and technological (PEST) analysis
- ◆ Brainstorming results
- ◆ Action plan to solve business problem(s)
- ◆ Agendas and minutes of meetings discussing implementation of action plan
- ◆ Correspondence detailing implementation
- ◆ Implementation plans
- ◆ Updated implementation plans
- ◆ Resource plans
- ◆ Presentations on implementation
- ◆ Review and updated action plan
- ◆ Evaluation report including identification of other approaches
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S404: Make Decisions in a Business Environment

**SQA Code FE13 04**

## General Overview

This optional Unit is about identifying and agreeing criteria for decision-making, reviewing information needed to make decisions and evaluating the decision-making process.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Job description detailing role and responsibilities
- ◆ A diagram of the candidate's role set
- ◆ The decision-making responsibilities of the candidate
- ◆ Details of the decision-making processes that exist and the line management responsibilities and relationships within the candidate's organisation
- ◆ Details of the projects the candidate has been involved in
- ◆ Project aims and objectives and roles of the candidate and other colleagues and stakeholders
- ◆ Records of communications with colleagues and stakeholders which show that the candidate communicates effectively and takes account of their views and needs in relation to decision-making
- ◆ Records of communications with colleagues and stakeholders which show that the candidate has fulfilled agreements with colleagues and stakeholders (or notified them promptly if this is impossible) and has exchanged information and resources to facilitate effective working leading to decision-making
- ◆ Records of communications with colleagues and stakeholders which show that the candidate can justify the decisions made by using evidence, argument, questioning and assertiveness
- ◆ Evaluation reports including learning points to improve future decision-making
- ◆ Agendas and minutes of meetings
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S405: Negotiate in a Business Environment

**SQA Code FE14 04**

## General Overview

This optional Unit is about preparing a negotiation brief and negotiating with a third party to achieve planned objectives.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Job description detailing role and responsibilities
- ◆ A diagram of the candidate's role set
- ◆ The negotiation responsibilities of the candidate
- ◆ Details of the negotiation processes that exist and the line management responsibilities and relationships within the candidate's organisation
- ◆ Negotiation briefs and roles of the candidate and other colleagues and stakeholders
- ◆ Record of the objectives the other negotiator(s) may be trying to achieve
- ◆ Research detailing the strength of the other negotiator(s) position prior to negotiations taking place
- ◆ Records of communications with colleagues and stakeholders which show that the candidate communicates effectively and takes account of their views and needs in relation to negotiation
- ◆ Records of communications with colleagues and stakeholders which show that the candidate has fulfilled agreements with colleagues and stakeholders (or notified them promptly if this is impossible) and has exchanged information and resources to facilitate effective negotiation
- ◆ Records of communications with colleagues and stakeholders which show that the candidate can justify the decisions made by using evidence, argument, questioning and assertiveness
- ◆ Problem log with solutions
- ◆ Clear and accurate records of the negotiations and outcomes
- ◆ Evaluation reports including learning points to improve future negotiation skills
- ◆ Agendas and minutes of meetings
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S406: Manage an Office Facility

**SQA Code FE15 04**

## General Overview

This optional Unit is about providing and maintaining office equipment, resources and facilities to meet the needs of office users.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ List of office equipment and resources
- ◆ Copy of correspondence notes/memos/(e-mails) of discussions with suppliers inviting competitive costs for new equipment and resources
- ◆ Copy of correspondence notes/memos/(e-mails) of discussions with suppliers ordering new equipment and resources
- ◆ Copy of correspondence notes/memos/(e-mails) of discussions with suppliers advising of repairs
- ◆ Copies of purchase orders, invoices
- ◆ Health, safety and security reports
- ◆ Risk assessment reports
- ◆ Problem log
- ◆ Maintenance records/schedules
- ◆ Guidance manuals for use of equipment
- ◆ Evaluation forms in relation to reviewing office systems and procedures
- ◆ Report on the findings of the office systems and procedures review detailing clear recommendations for improvement

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S407: Propose and Design Administrative Services

**SQA Code FE16 04**

## General Overview

This optional Unit is about proposing, agreeing and designing administrative services to meet specified needs.

## Performance Indicators

The types of evidence that may be used could include:

### Make proposals for administrative services

- ◆ Assessor observation
- ◆ The organisation's administrative services policies and procedures
- ◆ The legal and regulatory requirements relevant to the organisation's administrative services
- ◆ Roles and responsibilities of staff responsible for making decisions on the organisation's administrative services policies and procedures
- ◆ The users of the organisation's administrative services
- ◆ Evaluation report of current administrative services including findings and recommendations
- ◆ Draft administrative services specifications in line with legal and organisational requirements
- ◆ Budget specifications
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### Design administrative services

- ◆ Consultation report on draft design options including evaluation of all design options' strengths and weaknesses
- ◆ Agreed design options consistent with specifications and budgets, conforming to organisational and legal requirements
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S408: Prepare, Co-ordinate and Monitor Operational Plans

**SQA Code FE17 04**

## General overview

This optional Unit is about preparing, co-ordinating, implementing and monitoring operational plans in line with organisational policies and procedures and legal requirements.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ The organisation's mission and objectives
- ◆ Corporate strategies and policies
- ◆ Correspondence/minutes of management meetings re operational plans
- ◆ Operational Plans in line with organisational priorities, objectives and constraints
- ◆ Updated Operational Plans reflecting changes in the working environment or objectives
- ◆ Risk assessments
- ◆ Strengths, weaknesses, opportunities and threats (SWOT) analysis
- ◆ Political, environmental, social and technological (PEST) analysis
- ◆ Correspondence/minutes of management meetings re negotiating roles and responsibilities for implementing operational plans
- ◆ Correspondence/minutes of management meetings re negotiating work methods and activities to deliver operational plans
- ◆ Implementation plans in line with organisational policies and procedures and legal requirements
- ◆ Updated implementation plans including communication methods
- ◆ Monitoring records
- ◆ Evaluation reports
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S409: Implement, Monitor and Maintain Administrative Services

**SQA Code FE18 04**

## General Overview

This Unit is about planning, implementing and monitoring administrative services to meet specified needs and recommend improvements where necessary.

This involves:

- ◆ Involving users in planning how administrative services will be implemented.
- ◆ Negotiating and agreeing plans for implementing administrative services.
- ◆ Communicating plans to those involved.
- ◆ Amending plans to take account of feedback and communicating any changes to those involved.
- ◆ Making sure those involved in the implementation understand the implications for their work.
- ◆ Checking plans conform to legal and regulatory requirements.
- ◆ Providing support to users to enable them to use administrative services and systems.
- ◆ Planning and taking action to minimise disruptions to work output and the working environment during the implementation.
- ◆ Implementing administrative services according to agreed plans.
- ◆ Checking that administrative services are being used correctly.
- ◆ Taking appropriate action where administrative services are not being used correctly.
- ◆ Using appropriate methods to encourage users to comment on administrative services and to suggest how they can be improved.
- ◆ Collecting valid and reliable information which is sufficient to allow evaluation of administrative services.
- ◆ Making improvements to the administrative services within own area of authority and in line with legal and regulatory requirements.
- ◆ Communicating improvements to all involved.
- ◆ Making recommendations for improvements to services which are beyond the limits of own authority.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, memos and e-mails
- ◆ Copies of plans
- ◆ Evidence of administrative services being used to support plans
- ◆ Administrative Service Plans
- ◆ Implementation plans
- ◆ Records of amendment to plans
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S410: Plan, Run and Evaluate Projects

**SQA Code FE19 04**

## General Overview

This optional Unit is about planning, running and evaluating projects to achieve planned outcomes.

## Performance Indicators

The types of evidence that may be used could include:

### Prepare and plan the project

- ◆ Assessor observation
- ◆ A list of all project stakeholders
- ◆ Minutes of meetings detailing project purpose, aims, objectives, scope and timescale
- ◆ Project specifications
- ◆ Project budgets
- ◆ Resource plans
- ◆ Research plans
- ◆ Action plans
- ◆ Stakeholder planning
- ◆ Risk assessments
- ◆ Contingency plans
- ◆ Project communication plan
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### Run the project

- ◆ Assessor observation
- ◆ Roles and responsibilities of the project team
- ◆ Reviewed, monitored and updated plans
- ◆ Project management records
- ◆ Budget reviews
- ◆ Interim project reports
- ◆ Final project report
- ◆ Agendas and minutes of all project meetings
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Evaluate the project**

- ◆ Assessor observation
- ◆ Project evaluation report including the degree to which the project met its aims and objectives, and the project's strengths and areas for improvement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S411: Chair Meetings

**SQA Code FE1A 04**

## General Overview

This optional Unit is about participating in meetings in an active and constructive way. It involves preparation before the meeting, perhaps researching information, consulting with others and clarifying your own objectives and opinions on the various agenda items. It also involves taking a positive stance within the meeting, presenting information and opinions clearly and concisely and acknowledging and building on the contributions of others, in order to arrive at the meeting's objectives. After the meeting, it may be necessary to communicate decisions to other people, in line with any protocol agreed at the meeting.

## Performance Indicators

The types of evidence that may be used could include:

### Before the meeting

- ◆ Assessor observation
- ◆ Notes agreeing purpose and time of meeting
- ◆ Agendas/chair agendas
- ◆ Invitations to attend
- ◆ Meeting papers
- ◆ Briefing papers identifying key issues
- ◆ Venue details
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### During the meeting

- ◆ Assessor observation
- ◆ Professional discussion/oral questioning/written questioning

### After the meeting

- ◆ Assessor observation
- ◆ Approval of draft minutes
- ◆ Minutes of meeting including actions
- ◆ Evidence of actions being implemented (e-mail confirmation)
- ◆ Feedback forms
- ◆ Evaluation records and learning points for improvement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S413: Design and Develop Information Systems

**SQA Code FE1L 04**

## **General Overview**

This Optional Unit is about designing, developing and testing information systems to meet organisational and users' needs.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Agendas and minutes of meetings identifying and agreeing user needs, resources and budgets
- ◆ System specifications
- ◆ Implementation plans
- ◆ Copy of 'test log' detailing the information system being tested
- ◆ Copies of correspondence confirming the information system meets agreed specifications, users' needs and came in on budget
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S414: Manage and Evaluate Information Systems

**SQA Code FE1M 04**

## **General Overview**

This Optional Unit is about managing, monitoring and evaluating information systems to meet organisational and users' needs.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Training plans (including legislative and organisation requirements)
- ◆ Training records
- ◆ Training evaluation records
- ◆ Monitoring records
- ◆ Information system problems log
- ◆ Evaluation feedback/reports including recommendations
- ◆ Implementation of evaluation recommendations
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S415: Prepare Specifications for Contracts

**SQA Code FE1C 04**

## **General Overview**

This optional Unit is about preparing specifications for contracts including agreement of the selection criteria.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Minutes of meetings detailing specifications for contracts and agreement of the selection criteria
- ◆ Contract specifications for products/services (in line with legislative, regulative and organisational requirements)
- ◆ Contract selection criteria for products/services (in line with legislative, regulative and organisational requirements)
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S416: Manage Budgets

**SQA Code FE1D 04**

## **General Overview**

This Optional Unit is about controlling, monitoring and recording transactions for an agreed budget.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Minutes of budget review meetings (including discussions on overspends)
- ◆ Reviews
- ◆ Copies of budget performance (recording transactions)
- ◆ Purchase orders
- ◆ Invoices
- ◆ Signed off budgets
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S417: Invite Tenders and Select Contractors

**SQA Code FE1E 04**

## **General overview**

This optional Unit is about inviting, receiving, recording and evaluating tenders and selecting and awarding contracts.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Tender information pack (including specifications)
- ◆ Invitations to tender
- ◆ Record of tenders received
- ◆ Records of evaluation of tenders against criteria
- ◆ Agendas and minutes of management meetings
- ◆ Copies of correspondence to unsuccessful contractors (including feedback)
- ◆ Records of communication negotiating with successful suppliers
- ◆ Copies of contracts detailing specifications in line with legislative, regulative and organisational requirements
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S418: Monitor and Evaluate Contracts

**SQA Code FE1F 04**

## General Overview

This optional Unit is about monitoring and evaluating contractors' performance against agreed objectives of the contract.

## Performance Indicators

The types of evidence that may be used could include:

### Monitor contractors' performance

- ◆ Assessor observation
- ◆ Project plans
- ◆ Action plans
- ◆ Implementation plans
- ◆ Monitoring records
- ◆ Contract variations
- ◆ Compliance targets
- ◆ Compliance activities
- ◆ Records of non-compliance
- ◆ Agenda and minutes of management meetings
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### Evaluate contractors' performance

- ◆ Assessor observation
- ◆ Correspondence agreeing sources of information for evaluation
- ◆ Analysis of information
- ◆ Report identifying contractors' strengths and areas for improvement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S419: Implement and Evaluate Innovation in a Business Environment

**SQA Code FE1G 04**

## General Overview

This Optional Unit is about contributing to identifying ideas and being prepared to put them forward when working in a business environment.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ The organisation's mission and objectives
- ◆ Candidate job description detailing role and responsibilities
- ◆ A diagram of the candidate's role set
- ◆ The decision making responsibilities of the candidate
- ◆ Details of the decision making processes that exist and the line management responsibilities and relationships within the candidate's organisation
- ◆ Strengths, weaknesses, opportunities and threats (SWOT) analysis
- ◆ Political, environmental, social and technological (PEST) analysis
- ◆ Research identifying possible innovations to working methods, services or products
- ◆ Records of communication with colleagues evaluating the research ideas
- ◆ Evaluation of own ideas
- ◆ Cost benefit analysis
- ◆ Impact analysis
- ◆ Risk analysis
- ◆ Formal proposal identifying new working methods, services or products
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S420: Plan Change for a Team

**SQA Code FE1H 04**

## General Overview

This Optional Unit is about identifying and developing opportunities for change and planning change for a team.

## Performance Indicators

### Identify and develop opportunities for change

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Minutes of meetings detailing new products and/or services; improvements to existing products and/or services; improvements to existing practices, procedures, systems, ways of working within the team or those of the wider organisation or customers or suppliers
- ◆ Communications — notes, memos, minutes of meetings, reports identifying (internal/external) triggers for change
- ◆ Action plans detailing (SMART) objectives, budgets and timescales
- ◆ Research reports
- ◆ Resource plans
- ◆ Risk assessments
- ◆ Cost analysis
- ◆ Budgets
- ◆ Targets
- ◆ Personal statement detailing how to engage teams and individuals in the whole change process and encourage them to feel they are contributing to the process; the impact of change and innovation on teams and individuals and how to manage this impact to achieve positive outcomes
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### Plan for change

- ◆ Assessor observation
- ◆ Communications (notes, memos, minutes of meetings, reports) detailing plans for change
- ◆ Change plans (identifying vision, goals, objectives, timescales and resources)
- ◆ Updated plans (reflecting changes)
- ◆ Communicate change using e-mails, letters, meeting notes, memos
- ◆ Presentations
- ◆ Log of problems identified and solutions used
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S421: Plan Change Across Teams

**SQA Code FE1J 04**

## General Overview

This optional Unit is about identifying and developing opportunities for change and planning change across teams.

## Performance Indicators

The types of evidence that may be used could include:

### Identify and develop opportunities for change

- ◆ Assessor observation
- ◆ Communications — notes, memos, minutes of meetings, reports identifying (internal/external) triggers for change
- ◆ Action plans detailing (SMART) objectives, budgets and timescales
- ◆ Research reports
- ◆ Resource plans
- ◆ Risk assessments
- ◆ Cost analysis
- ◆ Budgets
- ◆ Targets
- ◆ Personal statement detailing how to engage teams and individuals in the whole change process and encourage them to feel they are contributing to the process, the impact of change and innovation on teams and individuals and how to manage this impact to achieve positive outcomes
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

### Plan for change

- ◆ Assessor observation
- ◆ Communications — notes, memos, minutes of meetings, reports detailing plans for change
- ◆ Change plans (identifying vision, goals, objectives, timescales and resources)
- ◆ Updated plans (reflecting changes)
- ◆ Communicate change using e-mails, letters, meeting notes, memos
- ◆ Presentations
- ◆ Log of problems identified and solutions used
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S422: Implement, Monitor and Review Change

**SQA Code FE1K 04**

## General Overview

This optional Unit is about implementing, monitoring and evaluating change in terms of organisational requirements.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Agendas and minutes of meetings discussing implementation
- ◆ Correspondence detailing implementation
- ◆ Implementation plans
- ◆ Updated implementation plans
- ◆ Resource plans
- ◆ Presentations on implementation
- ◆ Cost analysis
- ◆ Budgets
- ◆ Targets
- ◆ Problem log, detailing solutions
- ◆ Evaluation reports
- ◆ Correspondence/presentations providing feedback
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S424: Manage Physical Resources

**SQA Code F2H7 04**

## General Overview

This Unit is about ensuring the availability of the physical resources (equipment, materials, premises, services and energy supplies) required to carry out planned activities in your area of responsibility. It involves identifying the resources required, making the business case to obtain these resources, planning how they will be used effectively, efficiently, safely and securely, monitoring resource use and taking corrective action, if required. This standard is imported from the **MSC Management and Leadership suite**.

This involves:

- ◆ Inviting those who use resources to contribute to identifying the resources required and planning and monitoring their use.
- ◆ Evaluating past patterns of resource use and trends and developments likely to affect future demand for resources.
- ◆ Identifying the range and quantity of resources required for the planned activities in your area of responsibility, including likely contingencies.
- ◆ Identifying sustainable resources and ensuring their effectiveness and efficiency.
- ◆ Making the business case for the resources required.
- ◆ Agreeing appropriate adjustments to your planned activities, where the required resources cannot be obtained in full.
- ◆ Making arrangements with suppliers for resources to be available when required.
- ◆ Planning to use resources in ways that are efficient and minimise any adverse impact on the environment.
- ◆ Taking appropriate action to ensure security of resources and that they are used safely.
- ◆ Monitoring the quality of resources and patterns of resource use continuously.
- ◆ Taking timely corrective action to deal with any significant discrepancies between actual and planned resource use.
- ◆ Recognising changes in circumstances promptly and adjusting plans and activities accordingly.
- ◆ Prioritising objectives and planning work to make the best use of time and resources.
- ◆ Accurately calculating risks, and making provision so that unexpected events do not impede the achievement of objectives.
- ◆ Monitoring the quality of work and progress against plans and taking appropriate corrective action, where necessary.
- ◆ Making best use of existing sources of information.
- ◆ Clearly identifying the value and benefits to people of a proposed course of action.

- ◆ Presenting ideas and arguments convincingly and in ways that strike a chord with people.
- ◆ Identifying the range of elements in a situation and how they relate to each other.
- ◆ Identifying the implications or consequences of a situation.
- ◆ Taking timely decisions that are realistic for the situation.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Records of utilisation of resources, future requirements
- ◆ Details of options for changes in the resources employed
- ◆ Notes, e-mails, memos letters and reports
- ◆ Minutes of meetings
- ◆ Analyses of resource costs, availability
- ◆ Spreadsheets or computations relating to resource costs
- ◆ Notes of research for alternative sources for resources
- ◆ Draft budgets
- ◆ Financial forecasts
- ◆ Presentations/briefings
- ◆ Cost-benefit analyses
- ◆ Gantt charts/network diagrams/flow charts
- ◆ Comparison of actual and planned resource utilisation
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S425: Manage the Environmental Impact of Your Work

**SQA Code F2H3 04**

## General Overview

This Unit is about managing work activities and resources in your area of responsibility in order to minimise the negative impact — and maximise the positive impact — they may have on the environment.

It involves organising work activities and using resources efficiently, understanding their impact on the environment and finding ways to reduce their negative and increase their positive impact. You may need to seek advice from environmental specialists when carrying out this function. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Organising work activities and the use of resources in area of your responsibility so that they are efficient and effective, comply with legal requirements and environmental policies, minimise the negative and maximise the positive impact on the environment.
- ◆ Identifying the environmental impact of work activities and the use of resources in your area of responsibility.
- ◆ Reporting any identified risks to the environment promptly.
- ◆ Encouraging people in your area of responsibility to identify opportunities for, and contribute to, improving environmental performance.
- ◆ Identifying and implementing changes to work activities and the use of resources that reduces the negative and increases the positive impact on the environment.
- ◆ Communicating the environmental benefits resulting from changes to work activities and the use of resources.
- ◆ Obtaining specialist advice to help you identify and manage the environmental impact of your work activities and use of resources.
- ◆ Recognising changes in circumstances promptly and adjusting plans and activities accordingly.
- ◆ Presenting present information clearly, concisely, accurately and in ways that promote understanding.
- ◆ Keeping people informed of plans and developments.
- ◆ Complying with, and ensuring others comply with, legal requirements, industry regulations, organisational policies and professional codes.
- ◆ Acting within the limits of your authority.
- ◆ Be vigilant for possible hazards.
- ◆ Making appropriate information and knowledge available promptly to those who need it and have a right to it.

- ◆ Encouraging others to share information and knowledge efficiently within the constraints of confidentiality.
- ◆ Making best use of available resources and proactively seeking new sources of support when necessary.
- ◆ Identifying the implications or consequences of a situation.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
  - Production and/or operational reports
  - Work schedules/records
  - Time sheets
- ◆ Stock reports and other data on work activities and resource utilisation
  - Risk assessments
  - COSHH records
  - Procedure manuals
  - Operational guidance and role profiles relating to the safe and secure use
- ◆ Handling and storage of resources that you have prepared
- ◆ Accident or incident reports
- ◆ Notes/minutes of meetings
- ◆ E-mails, memos and letters
- ◆ Briefings and/or presentations
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S426: Recruit, Select and Keep Colleagues

**SQA Code DR7K 04**

## General Overview

This Unit is about recruiting and selecting people to undertake identified activities or work- roles within your area of responsibility. It involves taking a fair and objective approach to recruitment and selection to ensure that individuals with the required skills, Knowledge and Understanding and who are likely to perform effectively are appointed.

As recruitment and selection can be expensive and time-consuming activities, the Unit also involves taking action to understand why colleagues are leaving and taking action to keep colleagues.

Whilst you would be expected to draw on the expertise of personnel specialists, you are not expected to be a personnel specialist yourself.

For the purposes of this Unit, 'colleagues' means those people for whom you have line management responsibility. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Talking with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving.
- ◆ Identifying ways of addressing staff turnover problems, implementing those which clearly fall within your authority and communicating others to the relevant people for consideration.
- ◆ Reviewing the work required in your area of responsibility, identifying any shortfalls.
- ◆ Identifying and reviewing the options for addressing any identified shortfalls, deciding on the best option(s) to follow.
- ◆ Consulting with others to produce or update job descriptions and person specifications where there is a clear need to recruit.
- ◆ Consulting with others to discuss and agree stages in the recruitment and selection process for identified vacancies.
- ◆ Ensuring any information on vacancies is fair, clear and accurate.
- ◆ Seeking and making use of specialist expertise in relation to recruiting, selecting and keeping colleagues.
- ◆ Ensuring the skills needed by applicants are no more than are required to perform the job.
- ◆ Participating in the recruitment and selection process, making sure the process is fair, consistent and effective.

- ◆ Making sure applicants who are offered positions are likely to be able to perform effectively and work with their new colleagues.
- ◆ Judging whether the recruitment and selection process has been successful in relation to recent appointments in your area and identifying any areas for improvements.
- ◆ Recognising opportunities presented by the diversity of people.
- ◆ Working to turn unexpected events into opportunities rather than threats.
- ◆ Trying out new ways of working.
- ◆ Identifying people's information needs.
- ◆ Seeking to understand people's needs and motivations.
- ◆ Complying with and ensuring others comply with, legal requirements, industry regulations, organisational policies and professional codes.
- ◆ Taking and implementing difficult and/or unpopular decisions
- ◆ Acting within the limits of your authority.
- ◆ Showing integrity, fairness and consistency in decision-making.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## Performance Indicators

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Data on staff turnover
- ◆ Strategies for retaining staff:
  - Spreadsheets and other records of staff turnover you have compiled and analysed to identify patterns and trends
  - Notes or records of formal staff exit interviews
  - Informal feedback from staff leaving the organisation
  - Summaries or analyses of the data collected relating to staff turnover and leaving interviews
  - Reports, proposals, action plans and other strategies you have developed for reducing staff turnover
  - Reviews of the workforce in your area of responsibility
  - Analyses of business and/or operational plans to identify likely future employment requirements (numbers of people, skills levels, employment patterns, etc)
  - Reviews of current workforce profile (numbers, skill levels, age, etc) to identify any potential shortfalls in requirements
  - Notes, e-mails, memos or other records of discussions with colleagues to identify possible solutions to current or potential workforce requirements
  - Reports or proposals addressing current or potential workforce requirements (eg recruitment, transfer or promotion, training, redundancy, early retirement, etc)
- ◆ Records of your role in the recruitment and selection of new staff:
  - Notes of discussions about, and copies of, job descriptions and person specifications you have developed
  - Notes, e-mails, memos or other records of discussions about the recruitment and selection process for new staff and your proposals for selection criteria
  - Notes of interviews or records of other selection processes you have engaged in
  - Reports, e-mails, memos or other records of your evaluation of the recruitment and selection process
  - Personal statement
  - Witness testimony
  - Professional discussion/oral questioning/written questioning

## Knowledge and Understanding

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S427: Provide Leadership for Your Team

**SQA Code DR73 04**

## General Overview

This Unit is about providing direction to the members of your team. Motivating and supporting them to achieve the objectives of your team and their personal work objectives. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Setting out and positively communicating the purpose and objectives of the team to all members.
- ◆ Involving members in planning how the team will achieve its objectives.
- ◆ Ensuring that each member of the team has personal work objectives and understands how achieving these will contribute to achievement of the team's objectives.
- ◆ Encouraging and supporting team members to achieve their personal work objectives and those of the team and providing recognition when objectives have been achieved.
- ◆ Winning, through your performance, the trust and support of the team for your leadership.
- ◆ Steering the team successfully through difficulties and challenges, including conflict, diversity and inclusion issues within the team.
- ◆ Encouraging and recognising creativity and innovation within the team.
- ◆ Giving team members support and advice when needed — especially during setbacks or change.
- ◆ Motivating team members to present their own ideas and listening to what they say.
- ◆ Encouraging team members to take the lead when they have the knowledge and expertise and showing willingness to follow this lead.
- ◆ Monitoring activities and progress across the team without interfering.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, memos and e-mails relating to the purpose and objectives of the team
- ◆ Draft plans
- ◆ Evidence of personal work objectives
- ◆ Evidence of team objectives
- ◆ Team minutes
- ◆ Appraisals
- ◆ Team progress documentation
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S428: Provide Leadership in Your Area of Responsibility

**SQA Code DR75 04**

## General Overview

This Unit is about providing direction to people in a clearly and formally defined area or part of an organization and motivating/supporting them to achieve the vision and objectives for the area. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Creating a vision of where your area is going and clearly and enthusiastically communicating it, together with supportive objectives and operational plans, to the people working within your area.
- ◆ Ensuring that people working within your area understand and can see how the vision, objectives and operational plans link to the vision and objectives of the overall organisation.
- ◆ Steering your area successfully through difficult challenges, including conflict, diversity and inclusion issue within the area.
- ◆ Creating and maintaining a culture within your area which encourages and recognizes creativity and innovation.
- ◆ Developing a range of leadership styles and selecting and applying them to appropriate situations and people.
- ◆ Communicating regularly, making effective use of a range of different communication methods, with all the people working within your area and showing that you listen to what they say.
- ◆ Giving people in your area support and advice when they need it especially during periods of setback and change.
- ◆ Motivating and supporting people in your area to achieve their work and development objectives and providing recognition when they are successful.
- ◆ Empowering people in your area to develop their own ways of working and take their own decisions within agreed boundaries.
- ◆ Encouraging people to take the lead in their own areas of expertise and show willingness to follow this lead.
- ◆ Winning, through your performance, the trust and support of people within your area for your leadership and getting regular feedback on your performance.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Letters, memos and e-mails relating to the organisation's vision
- ◆ Draft plans
- ◆ Team minutes
- ◆ Appraisals
- ◆ Evidence relating to the creation and maintenance of organisation's culture
- ◆ Evidence of encouraging and recognising creativity and innovation
- ◆ Evidence of motivating and supporting people in your area of responsibility
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S429: Provide Learning Opportunities for Colleagues

**SQA Code DR7C 04**

## General Overview

This Unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs.

Encouraging colleagues to take responsibility for their own learning is an aspect of this Unit as is your role in providing an 'environment', for example, in your team or area of responsibility, in which learning is valued.

For the purposes of this Unit, 'colleagues' means those people for whom you have line management responsibility. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Promoting the benefits of learning to colleagues and making sure that their willingness and efforts to learn are recognised.
- ◆ Giving colleagues fair, regular and useful feedback on their work performance, discussing and agreeing how they can improve.
- ◆ Working with colleagues — identifying and prioritising learning needs.
- ◆ Helping colleagues identify learning style(s) or combination of styles which works best for them and ensuring these are taken into account in identifying and undertaking learning activities.
- ◆ Working with colleagues to identify and obtain information on a range of possible learning activities to addressing identified learning needs.
- ◆ Recognising and seeking to find out about differences in expectations and working methods of any team members from a different country or culture and promoting ways of working that take account of their expectations and maximise productivity.
- ◆ Discussing and agreeing, with each colleague, a development plan which includes learning activities to be undertaken, the learning objectives to be achieved, the required resources and timescales.
- ◆ Working with colleagues to recognise and make use of unplanned learning opportunities.
- ◆ Seeking and making use of specialist expertise in relation to identifying and providing learning for colleagues.
- ◆ Supporting colleagues to undertake learning activities making sure any required resources are made available and making efforts to remove any obstacles to learning.
- ◆ Evaluating whether the learning activities have achieved the desired outcomes.
- ◆ Providing positive feedback on the learning experience.
- ◆ Working with colleagues to update their development plan.

- ◆ Encouraging colleagues to take responsibility for their own learning.
- ◆ Recognising opportunities presented by the diversity of people.
- ◆ Finding practical ways to overcome barriers.
- ◆ Making time available to support others.
- ◆ Seeking to understand individuals' needs, feelings and motivations and taking an active interest in their concerns.
- ◆ Encouraging and supporting others to make the best use of their abilities.
- ◆ Recognising the achievements and the success of others.
- ◆ Inspiring others with the excitement of learning.
- ◆ Confronting performance issues and sorting them out directly with the people involved.
- ◆ Saying no to unreasonable requests.
- ◆ Showing integrity, fairness and consistency in decision-making.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Notes, memos, e-mails and letters
- ◆ Records of feedback
- ◆ Performance appraisals/reviews
- ◆ Notes of discussions identifying learning and development preferences and needs
- ◆ Details of support arrangements
- ◆ Training and development opportunities that you have identified and enabled colleagues to access to meet agreed learning and development requirements
- ◆ Copies of development or learning plans
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# Unit S430: Develop Productive Working Relationships With Colleagues and Stakeholders

**SQA Code DP7M 04**

## General Overview

This Unit is about developing productive working relationships with colleagues, within your own organisation and within other organisations with which your organisation works, and with identified stakeholders. This standard is imported from the MSC Management and Leadership suite.

This involves:

- ◆ Identifying stakeholders and the background to and nature of their interest.
- ◆ Establishing working relationships with relevant colleagues and stakeholders.
- ◆ Recognising and respecting the roles, responsibilities, interests and concerns of colleagues.
- ◆ Creating an environment of trust and mutual respect.
- ◆ Understanding difficult situations and issues for your colleague's perspective, providing support as necessary to move things forward.
- ◆ Providing colleagues and stakeholders with appropriate information to enable them to perform effectively.
- ◆ Consulting colleagues and stakeholders in relation to key decisions and activities, taking account of their views, including their priorities, expectations and attitudes to potential risks.
- ◆ Fulfilling agreements made with colleagues and stakeholders and letting them know.
- ◆ Advising colleagues and stakeholders promptly of any difficulties or where it will be impossible to fulfill agreements.
- ◆ Identifying and sorting out conflicts of interest and disagreements with colleagues and stakeholders, minimising damage to work, activities, individuals and organisations involved.
- ◆ Monitoring and reviewing the effectiveness of working relationships with colleagues and stakeholders, seeking and providing feedback, to identify areas for improvement.
- ◆ Monitoring wider developments to identify issues of potential interest or concern to stakeholders in the future and identifying new stakeholders.
- ◆ Presenting information clearly, concisely, accurately and in ways that promote understanding.
- ◆ Showing respect for the views and actions of others.
- ◆ Seeking to understand people's needs and motivations.
- ◆ Complying with and ensuring others comply with legal requirements, industry regulations, organisational policies and professional codes.

- ◆ Creating a sense of common purpose.
- ◆ Working towards win-win solutions.
- ◆ Showing sensitivity to internal and external politics that impact on your area of work.
- ◆ Keeping promises and honouring commitments.
- ◆ Considering the impact of your own actions on others.
- ◆ Using communication styles that are appropriate to different people and situations.
- ◆ Working to develop an atmosphere of professionalism and mutual support.

A key piece of evidence could be a comprehensive storyboard supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the storyboard.

If a storyboard is not used to place the evidence in context then the work product mentioned above would have to be well annotated and personal statements used. Items of knowledge not evident from performance could be addressed in the personal statements or through the use of appropriate questions.

While gathering evidence against this Unit, please refer to the Core Units and try to gather evidence to cover these.

Remember all evidence must be triangulated — observation, work product, witness testimony and supplementary evidence.

## **Performance Indicators**

The types of evidence that may be used could include:

- ◆ Assessor observation
- ◆ Notes/other records detailing developments in the organisation and its environment
- ◆ Records of new stakeholders you have met or identified
- ◆ Minutes of meetings
- ◆ Records of formal or information meetings with colleagues and/or stakeholders
- ◆ Consultations
- ◆ E-mails, memos and letters
- ◆ Correspondence relating to difficulties or conflicts
- ◆ Notes or other records of verbal feedback
- ◆ Records of feedback given to colleagues and stakeholders
- ◆ Letters from colleagues or stakeholders giving you feedback
- ◆ Personal statement
- ◆ Witness testimony
- ◆ Professional discussion/oral questioning/written questioning

## **Knowledge and Understanding**

Depending on the type of evidence generated, some of the Knowledge and Understanding may be covered by performance evidence.

# **Appendix 1: Blank recording forms**

## Unit progress record

Qualification and level \_\_\_\_\_

Candidate \_\_\_\_\_

To achieve the whole qualification, you must prove competence in xx **mandatory** Units and xx **optional** Units.

### Unit Checklist

<b>Mandatory</b>									
<b>Optional</b>									

### Mandatory Units achieved

Unit number	Title	Assessor's signature	Date

### Optional Units achieved

Unit number	Title	Assessor's signature	Date





**Unit**

**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature**

\_\_\_\_\_

**Date**

\_\_\_\_\_

**Assessor's signature**

\_\_\_\_\_

**Date**

\_\_\_\_\_

**Internal verifier's signature**

\_\_\_\_\_

**Date**

\_\_\_\_\_

## Assessment plan

Units					
Activities	Performance Indicator (PI)	Method of assessment/ sources of evidence	Date of assessment	Evidence already available	Links to other Units (Performance Indicator)
Questioning for knowledge and understanding not apparent from performance to be identified from 2nd review					

Assessor's signature \_\_\_\_\_ 1st review due \_\_\_\_\_

Candidate's signature \_\_\_\_\_ 2nd review due \_\_\_\_\_

Date of agreement \_\_\_\_\_ Date of completion \_\_\_\_\_

**Personal statement**

<b>Date</b>	<b>Evidence index number</b>	<b>Details of statement</b>	<b>Links to other evidence (enter numbers)</b>	<b>Units, Performance Indicators covered</b>

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Observation record

Unit(s) \_\_\_\_\_  
Candidate \_\_\_\_\_  
Evidence index number \_\_\_\_\_  
Date of observation \_\_\_\_\_

Skills/activities observed	Performance Indicator(s) covered

**Knowledge and understanding apparent from this observation**

**Performance Indicators/Knowledge with other Units which this evidence covers**

**Assessor comments and feedback to candidate**

I can confirm the candidate's performance was satisfactory.

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Witness testimony

<b>SVQ title and level</b>	
<b>Candidate name</b>	
<b>Evidence index no</b>	
<b>Where applicable, evidence number to which this testimony relates</b>	
<b>Date of evidence</b>	
<b>Witness name</b>	
<b>Designation/relationship to candidate</b>	
<b>Details of testimony</b>	

I can confirm the candidate's performance was satisfactory.

**Witness's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Record of Performance Indicator/Knowledge and Understanding candidate questioning**

<b>Unit</b>	
<b>Evidence index number</b>	
<b>Context of discussion (ie Knowledge evidence does not flow naturally from performance)</b>	
<b>List of questions and candidate's responses</b>	
<b>Q</b>	
<b>A</b>	

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_