



## SCHEME OF WORK

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PROGRAMME: Level 3 Diploma in Volunteer Management

TARGET GROUP: Volunteer Managers

CONTEXT: This programme will be delivered primarily in the workplace, with classroom-based support where a learner requests it or where progress or outcomes of initial assessment demand it. This is a rolling programme and delivered on a 1-1 basis for assessment and group basis for knowledge, as and when required.

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QAN: 600/2613/3 (Edexcel)

CREDITS: 57

AIM: To provide an entry route in to the career area of volunteer management in the voluntary, public and private sectors and to enable learners to acquire the knowledge and skills they need to be an effective volunteer manager.

OBJECTIVES:

- To enable learners to manage growth in volunteering during changing times.
- To enable learners to manage the diverse needs of a growing number of volunteers.
- To enable learners to motivate and support volunteers.
- To enable learners to retain and develop volunteers.
- To enable learners complete the framework in a timely manner.
- To promote the role of volunteer management.
- To increase the proportion of skilled and qualified volunteer managers.
- To increase the diversity of volunteer managers.
- To increase the take up of Apprenticeships.
- To provide a route for progression into higher level qualifications.

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NOTES:

- P indicates opportunities for assessment of speaking, listening, reading and writing.
- : indicates opportunities for assessment of mathematics.
- ∞ indicates opportunities for assessment of ICT.

| UNIT   | ACTIVITIES   | LEARNING OUTCOMES  | ASSESSMENT METHODS   | RESOURCES   | PLTS/ERR/FS* MAPPING |
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| N/A  | <p>Induction</p> <p>Health and safety (H&amp;S), equality and diversity (E&amp;D), grievance, bullying harassment and appeals procedures. Structure of framework, test dates, roles of Assessor, Internal Quality Assessor (IQA), External Quality Assessor (EQA), portfolio building, timescales, documentation, enrolment paperwork, individual learning plan (ILP) and agree first work based evidence to be produced.</p>  | <p>Understanding of the rights and responsibilities in relation to their learning and in particular fairness and equality and diversity.</p> <p>Understanding of the structure of their qualification, their and our commitment, timeframes.</p>   | Tutorial, discussion, written documents  | Enrolment paperwork, policies and procedures, ILP and induction checklist.                          | P                    |
| <p>Encourage and motivate volunteers</p> <p>(mandatory unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• techniques to assess needs of and support individuals;</li> <li>• how to provide feedback to volunteers;</li> <li>• how to match volunteer contributions to organisational objectives;</li> <li>• techniques to motivate volunteers; and</li> <li>• the impact of equal opportunities issues on volunteering.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria.</p> | <p>Be able to motivate volunteers by promoting the special ethos and values of volunteering.</p> <p>Recognise voluntary effort by valuing volunteer contributions.</p> <p>Understand how to motivate volunteers by promoting the special ethos and values of volunteering.</p> <p>Understand how to recognise voluntary effort by valuing volunteer contributions.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and accredited prior learning (APL).</p> | <p>Assessment and session plan documents, feedback form, observation record and voice recorder.</p> | P                    |
| <p>Manage risk in relation to volunteers</p>                     | <p>Assessor will deliver knowledge on how to:</p> <ul style="list-style-type: none"> <li>• evaluate policy in relation to actual risk management:</li> <li>• identify good practice in risk management</li> </ul>  | <p>Understand how risk management impacts upon a volunteering policy</p>   | <p>From a range of methods including discussion, examination of</p>  | <p>Assessment and session plan documents and evaluation,</p>  | P                    |

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| <p>(mandatory unit)</p>                                 | <p>techniques:</p> <ul style="list-style-type: none"> <li>the measures that can be implemented to reduce risk;</li> <li>the legal requirements in relation to volunteering;</li> <li>how to undertake a skills audit of volunteers and map and match these to organisational goals;</li> <li>the differences between a pro-active and reactive risk management culture;</li> <li>how to ensure competence of staff; and</li> <li>how to develop a strategy for managing risk across individuals, activities and volunteer roles.</li> </ul> <p>The Learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p>   | <p>Be able to carry out and evaluate risk assessments.</p> <p>Be able to audit volunteer skills in relation to organisational goals.</p> <p>Be able to enable staff to assess and manage risk when working with volunteers.</p> | <p>work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p>  | <p>feedback form, observation record and voice recorder.</p>   |          |
| <p>Manage volunteer agreements<br/>(mandatory unit)</p> | <p>Assessor will deliver knowledge on the:</p> <ul style="list-style-type: none"> <li>differences between employment and volunteering, and between a contract of employment and a volunteer agreement;</li> <li>good practice in recruitment of volunteers including official processes that apply similarly to volunteers and employees;</li> <li>assist participants to identify at least four key pieces of legislation that impact on and contribute to good practice in volunteer agreements, for example H&amp;S, E&amp;D; and</li> <li>encourage participants to reflect on how legislation is implemented in their own organisations.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria.</p> | <p>Understand the difference between volunteer and employee relationships</p> <p>Understand good practice in the recruitment process for volunteers</p> <p>Understand good practice in volunteer agreements</p>                 | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P</p> |

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| <p>Promote volunteering within your organisation and to volunteers<br/><br/>(mandatory unit)</p> | <p>Assessor will deliver knowledge on how to:</p> <ul style="list-style-type: none"> <li>• identify the types of people who volunteer;</li> <li>• the definition of the volunteering roles in the organisation;</li> <li>• the knowledge, skills and experience needed from volunteers;</li> <li>• what motivates people to volunteer;</li> <li>• how to access groups of volunteers, perhaps non-traditional, and the various ways to communicate with them;</li> <li>• how volunteers add value to an organisation</li> <li>• how to obtain internal stakeholder “buy in” to volunteering roles’ in supporting volunteers and the attitudes that might manifest themselves from people in the organisation; and</li> <li>• the techniques and methodologies that can be employed to support volunteers and the best way to communicate these within the organisation in order to positively promote the role of and effectively and effectively support volunteers.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p> | <p>Understand the need to promote volunteering</p> <p>Be able to promote volunteering to key people in the organisation</p> <p>Be able to help people in the organisation support volunteers</p>             | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P<br/>~</p> |
| <p>Supervise and support volunteers<br/><br/>(mandatory unit)</p>                                | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• techniques to assess skills and activities of volunteers;</li> <li>• methodologies for improving effectiveness of volunteer skills;</li> <li>• show to agree development plans with volunteers, the signs that show volunteers need additional</li> </ul>   | <p>Know how to encourage the development of volunteers.</p> <p>Be able to provide appropriate and effective support to volunteers.</p> <p>Be able to evaluate volunteer activities and achievements in a</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions,</p>                                  | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P</p>       |

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|  | <p>;support and sources of such additional support;</p> <ul style="list-style-type: none"> <li>the reasons for and benefits of promoting a culture of development and learning;</li> <li>the impact of a blame culture on motivation and personal development;</li> <li>how to encourage reflection;</li> <li>the types of and techniques for giving positive and constructive feedback;</li> <li>how to evaluate volunteers' achievements, ways of encouraging and motivating volunteers, including how to celebrate their achievements; and</li> <li>the reasons for and purpose of feedback, the environments suitable for giving feedback and different ways of recording it.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p> | <p>constructive manner.</p> <p>Understand how to communicate and exchange feedback with volunteers.</p>   | <p>professional discussion and APL.</p>  |  |          |
| <p>Set objectives and provide support for team members<br/><br/>(mandatory unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>the purpose of a team, how to set objectives, what SMART means, how to communicate the team's purpose and objectives within the team;</li> <li>how to develop a plan with the team to deliver the objectives;</li> <li>how to encourage all team members to actively participate in planning;</li> <li>the techniques for developing plans to meet team objectives, including ensuring the team participates in this;</li> <li>how to agree personal objectives;</li> <li>the difficulties and opportunities that team members might face and the types of support that they might need in order to deliver team and individual</li> </ul>  | <p>Be able to communicate a team's purpose and objectives to the team members</p> <p>Be able to develop a plan with team members showing how team objectives will be met</p> <p>Be able to support team members identifying opportunities and providing support</p> <p>Be able to monitor and evaluate progress and recognise individual and team achievement</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P</p> |

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|   | <p>objectives; and</p> <ul style="list-style-type: none"> <li>• how to monitor and effectively evaluate progress at team and individual level.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p>  |   |  |  |          |
| <p>Introduction to managing volunteers<br/>(mandatory unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• the role of managing volunteers and the responsibilities involved in it;</li> <li>• the benefits of volunteering to the organisation, volunteers and clients;</li> <li>• the legal status of volunteers and the differences between volunteers and paid staff;</li> <li>• relevant legislation in managing volunteers such as health and safety, equality and diversity, safeguarding and data protection, what a good volunteer policy looks like, the importance of risk assessments and risk management;</li> <li>• the importance of promoting volunteering to potential volunteers;</li> <li>• effective processes for the recruitment, induction, retention of volunteers, the techniques for leading, motivating, supporting and developing volunteers;</li> <li>• how to manage volunteers, communication techniques, different management styles and adapting own to suit individuals; and</li> <li>• how to assess performance and provide effective feedback.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria.</p> | <p>Understand managing volunteers</p> <p>Understand policies and procedures relating to the management of volunteers.</p> <p>Understand the management of volunteers.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment plan document, feedback form, observation record and voice recorder.</p> | <p>P</p> |

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| <p>Understand effective partnership working between organisations</p> <p>(mandatory unit)</p>       | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• different types of partnerships that are in operation, the benefits and risks, advantages and disadvantages of partnership working;</li> <li>• what policies and legislation that might apply to partnership working;</li> <li>• how to share information whilst maintaining data protection and the protocols and legislation that underpin this;</li> <li>• how to reach and share effective decision making with partners and when legal advice should be taken on partnership arrangements;</li> <li>• what partnership working means;</li> <li>• the techniques employed when developing positive relationships; and</li> <li>• the communication mechanisms employed, including the impact of technology, and why it's important to record communications with partners.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria.</p> | <p>Understand how effective partnership working can help an organisation achieve its mission.</p> <p>Understand how partnership working is governed.</p> <p>Understand how to work in partnership with other organisations.</p>           | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P</p>       |
| <p>Developing structures, systems and procedures to support volunteering</p> <p>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how to evaluate current policies, structures, systems and procedures that support volunteering, including organisational, legal and regulatory contexts and best practice in the sector; and</li> <li>• facilitate discussion on improvements needed and assist participants in producing an action plan to implement improvements.</li> </ul> <p>The learner will participate in learning sessions and provide</p>   | <p>Understand the organisation's policy, structure, systems and procedures that support volunteering.</p> <p>Be able to justify and design improvements to organisational structures, systems and procedures to support volunteering.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and</p>      | <p>Assessment plan document, feedback form, observation record and voice recorder.</p>                             | <p>P<br/>~</p> |

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|   | evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria.  | Be able to produce an action plan for the implementation of those improvements.  | APL.   |  |        |
| Managing and developing relationships in the workplace<br><br>(optional unit) | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how to identify the needs and expectations of all stakeholders in the volunteering process including clients, team members, management, other stakeholders;</li> <li>• why it is important that the learner knows the requirements of others – for example in relation to meeting objectives and targets, in retaining and motivating staff, in being able to provide realistic support, advice and guidance to clients, identify ways of meeting needs within organisational, legal and regulatory boundaries;</li> <li>• how to check that needs have been met, for example team and individual meetings with staff, progress reviews with clients;</li> <li>• how to manage relationships when needs cannot be met - for example managing expectations, when confidentiality doesn't apply or where harm might be caused to self or others in relation to clients; and</li> <li>• how to suggest alternatives when original agreed needs and expectations no longer apply - for example changes to organisation structures, changes to legislation, changes to or reductions in funding and how to source additional external support.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p> | <p>Examine the needs and expectations of others.</p> <p>Meet the needs and expectations of others.</p> <p>Be able to manage relationships where it is not possible to meet the need or expectations of others.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment plan document, feedback form, observation record and voice recorder.</p> | P      |
| Ensure your own actions   | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• H&amp;S legislation including features of it, policies,</li> </ul>  | Understand legal and organisational requirements in  | From a range of methods including  | Assessment plan document,  | P<br>Ⓜ |

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| <p>reduce risks to health and safety</p> <p>(optional unit)</p>                          | <p>procedures, codes of practice in relation to their duties and responsibilities for H&amp;S;</p> <ul style="list-style-type: none"> <li>the importance of reducing risks to H&amp;S, what potential risks there might be in the workplace, what constitutes a responsible person, how personal conduct and presentation impact on H&amp;S;</li> <li>how to undertake a risk assessment, how to evaluate harmful working practices and how to prioritise high, medium and low risk factors, when risks can be dealt with and when they should be escalated up the chain;</li> <li>the difference between a risk and a hazard; and</li> <li>impact of not effectively managing risk to clients, self, the team, the organisation.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria. The learner will also undertake online training in H&amp;S.</p> | <p>relation to health and safety.</p> <p>Be able to identify hazards and evaluate risks in the workplace.</p> <p>Be able to reduce risks to health and safety in the workplace.</p>   | <p>discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p>                                   | <p>feedback form, observation record and voice recorder.</p>   |          |
| <p>Manage own professional development within an organisation</p> <p>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>how to identify career and personal goals and how these impact on the work role and professional development - for example how to prioritise development to meet organisational needs and personal needs;</li> <li>how to agree SMART personal work objectives and ensure they contribute to organisational objectives;</li> <li>how to undertake a gap analysis between personal objectives and current skills and knowledge; and</li> <li>the types of and how to produce a personal development plan, how to ensure the personal development plan is delivered and how to review progress against it.</li> </ul> <p>The learner will participate in learning sessions and provide</p>   | <p>Be able to assess own career goals and personal development.</p> <p>Be able to set personal work objectives.</p> <p>Be able to produce a personal development plan.</p> <p>Be able to implement and monitor own personal development plan.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P</p> |

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|   | evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria   |   |  |  |         |
| Plan, allocate and monitor work of a team<br><br>(optional unit)                          | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how to ensure team objectives are supported by management and develop a plan to deliver them;</li> <li>• techniques for agreeing work allocation and standards of work, methods of supporting staff to deliver their objectives, including tying them into team objectives;</li> <li>• how to monitor performance against previously agreed standards and objectives;</li> <li>• how to manage conflict within the team;</li> <li>• how to identify causes of not meeting objectives, techniques for improving team performance including reallocation of work, renegotiating objectives and targets;</li> <li>• using individual team members' strengths to most effectively deliver objectives; and</li> <li>• how to provide constructive feedback in ways that will encourage improved performance.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p> | <p>Be able to plan work for a team.</p> <p>Be able to allocate work across a team.</p> <p>Be able to manage team members to achieve team objectives.</p> <p>Be able to monitor and evaluate the performance of team members.</p> <p>Be able to improve the performance of a team.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | P       |
| Understand values, ethics and safeguarding in the voluntary sector<br><br>(optional unit) | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• differences between mission, vision and values and ethics and how these influence practice in different organisations;</li> <li>• what equality and diversity means and the importance and benefits of promoting equality, diversity and inclusion in the organisation;</li> <li>• what an equality impact assessment is, the</li> </ul>  | <p>Understand values and ethics in the voluntary sector.</p> <p>Understand the importance of equality, diversity and inclusion in the voluntary sector.</p> <p>Understand safeguarding in the voluntary sector.</p>   |  |  | P<br>~0 |

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|   | <p>legislation underpinning equality and diversity, the importance of safeguarding to the client, staff, the organisation and funders; and</p> <ul style="list-style-type: none"> <li>• current safeguarding legislation, the practical implementation of safeguarding clients.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria. The learner will undertake online learning in E&amp;D and safeguarding.</p>   |   |  |  |                |
| <p>Contribute to safeguarding children, young people and vulnerable adults<br/><br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• key aspects of organisational policy and practice in relation to safeguarding young people, vulnerable adults and staff working with them;</li> <li>• facilitate discussion on the practical aspects of safeguarding within their own organisation and how organisational practices comply with legislation in relation to data and when confidential information can be shared – for example where harm might be caused, the importance of safeguarding in general and child protection in particular;</li> <li>• what is meant by a person centred approach and the impact this has on clients and staff, how partnership working works in relation to safeguarding, the different roles and responsibilities of external organisations in cases of abuse, the signs, symptoms, indicators and behaviours that may indicate there is a safeguarding issue;</li> <li>• facilitate discussion on organisational procedure where harm or abuse is alleged; and</li> <li>• discuss the rights of individuals where harm is suspected or alleged.</li> </ul> <p>The Learner will participate in learning sessions and provide</p> | <p>Understand their organisation's policies, procedures and practices for safe working with children, young people and vulnerable adults.</p> <p>Understand the importance of working in partnership with other organisations to safeguard children, young people and vulnerable adults.</p> <p>Understand how to respond to evidence or concerns that a child or young person has been abused or harmed.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | <p>P<br/>~</p> |

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|   | evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria. The Learner will undertake online learning in safeguarding.   |  |  |  |   |
| Monitor the programme of work<br><br>(optional unit)  | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how to develop a programme of work, including how to agree aims and objectives, define roles and responsibilities;</li> <li>• how to define timescales and milestones;</li> <li>• the difference between monitoring and evaluation;</li> <li>• why progress of work needs to be monitored, the different techniques and tools used to monitor work; and</li> <li>• how to risk assess the programme of work and mitigating actions, the risks involved if slippage occurs, the data that can be produced from monitoring and how these can be used in a positive and effective way - for example for marketing and promotion, for staff development, to identify underperformance and slippage, potential external factors that could impact on the programme of work, the tools and techniques for monitoring progress.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p> | <p>Understand the programme of work.</p> <p>Understand monitoring activities.</p> <p>Be able to monitor the progress of the programme of work.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | P |
| Evaluate the programme of work<br><br>(optional unit) | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how to develop a programme of work, including how to agree aims and objectives, define roles and responsibilities;</li> <li>• how to define timescales and milestones, the difference between monitoring and evaluation – for example progress verses impact;</li> <li>• the importance of evaluation – for example impact,</li> </ul>   | <p>Understand the programme of work.</p> <p>Understand evaluation activities.</p> <p>Understand how to evaluate a programme of work.</p>           | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge</p>   | <p>Assessment and session plan documents and evaluation, feedback form, observation record and voice recorder.</p> | P |

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|   | <p>value for money, continuation of funding, the benefits of an evaluation framework – for example to provide structure, consistency, objectivity;</p> <ul style="list-style-type: none"> <li>the techniques and tools used in evaluation</li> <li>what external benchmarks and standards can be used in evaluation, the types of information needed – qualitative and quantitative, external factors that might impact on the evaluation;</li> <li>how to write an executive summary;</li> <li>how to write a conclusion;</li> <li>how to make recommendations; and</li> <li>how to present information.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and assessment criteria</p>               | <p>Be able to evaluate the programme of work.</p>  | <p>questions, professional discussion and APL.</p>   |  |                |
| <p>Budgeting for business<br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>purpose of budget planning to meet business requirements;</li> <li>purpose of agreeing formats, using estimations, identifying timescales, priorities and financial resources needed;</li> <li>purpose of monitoring, controlling and recording income and expenditure, negotiating and agreeing a budget, situations when revisions may be needed; and</li> <li>how to construct a simple budget and how to monitor the budget to control and enhance business performance – for example value for money, curb overspend, vire between budget heads, use as a basis to inform new budgets.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence</p> | <p>Understand the relevance of budgets and the importance of operating within them.</p> <p>Be able to construct and manage a budget.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment plan document, feedback form, observation record and voice recorder.</p> | <p>P<br/>:</p> |

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|  | against the learning outcomes and assessment criteria   |  |  |   |   |
| Speaking and listening skills<br>(optional unit) | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• how language and tone of voice convey messages, the barriers preventing effective speaking and listening – for example environmental and ergonomic factors, whether the listener listens or merely hears;</li> <li>• body language, strategies that overcome barriers, passive and active listening, the key features of effective communication, logical sequencing, how to moderate voice, pace and volume when speaking to others;</li> <li>• techniques to encourage full participation in a group situation - for example the pose, pause, pounce method;</li> <li>• activities that are sufficiently different to support varying needs; and</li> <li>• how to keep discussions moving forward and avoid stalemate and irrelevancy, why and how to adapt things to suit the audience, how to respond to criticism constructively and give constructive criticism and feedback.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p> | <p>Be able to communicate with others.</p> <p>Be able to present information to others.</p> <p>Be able to obtain information from others.</p> <p>Be able to engage in discussion.</p>    | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment plan document, feedback form, observation record and voice recorder.</p>                              | P |
| Negotiation and influencing<br>(optional unit)   | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• the different factors that influence negotiations – the needs and wishes of all parties (and the difference between them), timescales, location, external and internal economic climate, different values;</li> <li>• compromise – the stages of the negotiation process, the significance of a win-win scenario and its</li> </ul>   | <p>Understand the aims and principles of effective negotiation and influencing skills.</p> <p>Know a variety of negotiation and influencing techniques and when they should be used.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony,</p>   | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | P |

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|  | <p>effectiveness over win-lose, lose-lose and lose-win situations;</p> <ul style="list-style-type: none"> <li>the techniques that can be employed in negotiations and the optimum times for using them;</li> <li>methods of recording negotiations; and</li> <li>how to assess where changes need to be made in approach.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p>   | <p>Be able to demonstrate effective negotiation and influencing skills based on reflective practice.</p>   | <p>knowledge questions, professional discussion and APL.</p>   |   |                      |
| <p>Manage customer service in own area of responsibility<br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>legal and regulatory standards in customer service (H&amp;S, E&amp;D, Data Protection, Consumer Law etc);</li> <li>techniques and criteria to measure and monitor customer service performance;</li> <li>the roles and responsibilities in customer service;</li> <li>methods for analysing feedback on the quality of customer service; and</li> <li>how to undertake an evaluation of customer feedback and plan for improvements.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria.</p> | <p>Be able to establish and communicate measurable customer service standards for own area of responsibility.</p> <p>Be able to support staff in meeting customer service standards.</p> <p>Be able to monitor and evaluate customer service performance, systems and processes.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P</p>             |
| <p>Preparing to teach in the lifelong learning sector<br/>(optional unit)</p>    | <p>Assessor will deliver knowledge on the:</p> <ul style="list-style-type: none"> <li>role, responsibilities and boundaries of a teacher;</li> <li>the legislative, regulatory and good practice within teaching and learning;</li> <li>how to promote inclusion, the importance of record keeping (learner progress, audit, inspection, as a tool to continuous improvement);</li> </ul>  | <p>Understand own role, responsibilities and boundaries of role in relation to teaching.</p> <p>Understand appropriate teaching and learning approaches in the specialist area.</p>  | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge</p>   | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P<br/>:<br/>~</p> |

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|  | <ul style="list-style-type: none"> <li>• approaches to teaching and learning contextualised to area of learning;</li> <li>• techniques for embedding functional skills, teaching and learning methodologies;</li> <li>• how to plan a learning session, personalisation, techniques to engage and motivate learners, different methods of communication depending on learners;</li> <li>• how to give constructive feedback;</li> <li>• the need for reflective practice;</li> <li>• different assessment methodologies, different types of assessment (initial, formative, summative); and</li> <li>• the learner journey and how all the components of good teaching and learning theory and practice contribute to this and its audit trail.</li> </ul> <p>The Learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p> | <p>Demonstrate session planning skills.</p> <p>Understand how to deliver inclusive sessions which motivate learners.</p> <p>Understand the use of different assessment methods and the need for record keeping.</p>  | <p>questions, professional discussion and APL.</p>   |   |          |
| <p>Manage conflict in a team<br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• effective team working;</li> <li>• internal systems and processes that might give rise to conflict;</li> <li>• actions and techniques to avoid potential conflict;</li> <li>• strategies for conflict resolution;</li> <li>• the importance of fairness in a team setting;</li> <li>• legal and regulatory requirements; and the importance of record keeping.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p>  | <p>Be able to support team members' understanding of their role and position within a team.</p> <p>Be able to take measures to minimise conflict within a team.</p> <p>Be able to understand how to encourage team members to resolve their own conflicts.</p> <p>Be able to understand legal and organisational requirements concerning conflict.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P</p> |
| <p>Manage or</p>                                     | <p>Assessor will deliver knowledge on:</p>   | <p>Understand own responsibilities</p>   | <p>From a range of</p>   | <p>Assessment and</p>   | <p>P</p> |

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| <p>support equality of opportunity, diversity and inclusion in own area of responsibility</p> <p>(optional unit)</p> | <ul style="list-style-type: none"> <li>• legal and regulatory requirements in relation to equality of opportunity, its importance in an organisational context;</li> <li>• outline the content of an exemplar E&amp;D and inclusion policy and procedures; and</li> <li>• facilitate learner assessing own practice against organisational requirements.</li> </ul> <p>The learner will participate in learning sessions, undertake online learning and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p>  | <p>under equality legislation, relevant codes of practice and own organisational policies.</p> <p>Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures within own area of responsibility.</p> <p>Be able to monitor equality, diversity and inclusion within own area of responsibility.</p> | <p>methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p>                 | <p>session plan documents and evaluation, feedback form, observation record, and voice recorder.</p>                | <p>✓</p>       |
| <p>Make effective decisions</p> <p>(optional unit)</p>   | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• what circumstances might require a decision, why decisions are important, the types of information required for effective decisions, facilitate discussions on when participants have made decisions, the factors influencing them;</li> <li>• whether they were effective and why and ineffective and why; and</li> <li>• lessons learned from ineffective decisions.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p> | <p>Be able to identify circumstances that require a decision to be made.</p> <p>Be able to collect information to inform decision making.</p> <p>Be able to analyse information to inform decision making.</p> <p>Be able to make a decision.</p>  | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P</p>       |
| <p>Project Management</p> <p>(optional unit)</p>   | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• identifying differences between routine and project work;</li> <li>• the importance of agreeing the purpose, scope, roles and responsibilities, timescale, resources, budget, aims and objectives of a project;</li> <li>• how to identify and plan for project issues and risks;</li> </ul>  | <p>Understand the principles of project management</p> <p>Be able to produce a project plan to achieve specified aims and outcomes</p>   | <p>From a range of methods including discussion, examination of work products, observation, witness testimony,</p>   | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P<br/>:</p> |

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|  | <ul style="list-style-type: none"> <li>• how to undertake a risk assessment and incorporate mitigating actions;</li> <li>• techniques for project planning</li> <li>• methods for monitoring project progress, purpose of reporting progress, meeting agreed targets; and</li> <li>• ways and purpose of evaluating a project including cost benefit analysis.</li> </ul> <p>The learner will provide work place evidence of managing projects such as project plans.</p>   | <p>Be able to implement the project plan.</p> <p>Be able to evaluate the success of the project.</p>  | <p>knowledge questions, professional discussion and APL.</p>   |   |                      |
| <p>Working in administration<br/>(optional unit)</p>   | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• what an administrator does and how that role relates and impacts on others,</li> <li>• legislation including H&amp;S, E&amp;D, Data Protection;</li> <li>• an effective work area;</li> <li>• how to use some standard office equipment;</li> <li>• how to file and store information effectively and securely to ensure easy retrieval;</li> <li>• how to handle incoming and outgoing mail; and how to undertake a self assessment of skills and development needs.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria.</p> | <p>Understand the role of an administrator.</p> <p>Understand legislation affecting the work of administrators.</p> <p>Understand health and safety issues that affect the work of administrators.</p> <p>Be able to organise their work area.</p> <p>Be able to carry out a range of practical administrative processes.</p> <p>Be able to reflect on own performance.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P<br/>:<br/>☺</p> |
| <p>Introduction to campaigning<br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• what campaigning activities are and where lines are blurred between campaigning and fundraising;</li> <li>• the campaigning environment and its impact on</li> </ul>  | <p>Understand campaigning.</p> <p>Understand campaign strategies.</p>   | <p>From a range of methods including discussion, examination of</p>  | <p>Assessment and session plan documents and evaluation,</p>  | <p>P<br/>☺</p>       |

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|  | <p>specific campaigns, legislation, rights and restrictions of campaigners;</p> <ul style="list-style-type: none"> <li>• how beneficiaries can enhance campaigning activity;</li> <li>• the advantages and disadvantages of working with others to campaign;</li> <li>• the different between proactive and reactive campaigns, confidentiality and data protection, how to plan and undertake a campaign including research and applying the principles of project management;</li> <li>• why it's important to impact assess a campaign, the different types of campaigning, methodology and their advantages and disadvantages, the differences between target and audience;</li> <li>• why influencing targets and audiences is critical;</li> <li>• the techniques for getting campaign messages across, the materials, products that can be used in the campaign; and the role of the media in effective campaign delivery.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p> | <p>Understand campaigning techniques, methods and audiences.</p>   | <p>work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p>  | <p>feedback form, observation record, and voice recorder.</p>   |                      |
| <p>Introduction to fundraising<br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• ways and methods of fundraising;</li> <li>• the role and purpose of fundraising to an organisation;</li> <li>• the critical elements of a case for support, why donor research is important in building a case for support;</li> <li>• the importance of targeting appropriate support, how to ask for support, why supporters offer their support;</li> <li>• why a clear fundraising plan is important, sources of information that can be used in fundraising, legislation, confidentiality and codes of practice in</li> </ul>   | <p>Understand fundraising activities.</p> <p>Understand fundraising information and regulation.</p> <p>Understand funding sources and fundraising resources, income sources and budgets.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion and APL.</p> | <p>Assessment and session plan documents and evaluation, feedback form, observation record, and voice recorder.</p> | <p>P<br/>:<br/>~</p> |

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|  | <p>fundraising;</p> <ul style="list-style-type: none"> <li>• what the Fundraising Standards Board does;</li> <li>• what tax effective fundraising is, the different sources of funding, why it's necessary to keep to a budget in fundraising</li> <li>• the importance of measuring a return on investment; and the importance of maintaining supporter databases.</li> </ul> <p>The learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria</p>   |  |  |  |          |
| <p>Build, support and manage a team<br/><br/>(optional unit)</p> | <p>Assessor will deliver knowledge on:</p> <ul style="list-style-type: none"> <li>• the role of the team in achieving objectives;</li> <li>• how to identify team attributes and strengths needed to achieve objectives;</li> <li>• the types of and how to undertake skills and knowledge analysis of team members against needs;</li> <li>• how to ensure that team members understand their and others' roles and responsibilities;</li> <li>• the stages of team development (forming, storming, norming, performing);</li> <li>• how to encourage team members to share their own knowledge and skills to achieve objectives;</li> <li>• how to encourage communication, trust and respect between team members;</li> <li>• the techniques for monitoring and reviewing team performance;</li> <li>• how to ensure that any changes are communicated and how to provide support to team in light of changes; and</li> <li>• how to ensure team is prepared for project conclusion and closing down a team.</li> </ul> | <p>Understand the purpose and required attributes of a team and select those that match the team's requirements.</p> <p>Be able to induct team members and communicate their roles and responsibilities.</p> <p>Understand how to support team development.</p> <p>Be able to manage team performance and understand how to disband a team.</p> <p>Understand how to disband a team.</p> | <p>From a range of methods including discussion, examination of work products, observation, witness testimony, knowledge questions, professional discussion, APL</p> | <p>Assessment plan document, feedback form, observation record, voice recorder</p> | <p>P</p> |



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|  | The Learner will participate in learning sessions and provide evidence from the workplace to demonstrate competence against the learning outcomes and criteria. |  |  |  |  |
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\*PLTS = Personal Learning and Thinking Skills  
ERR = Employment Rights and Responsibilities  
FS = Functional Skills