



Business and Administration: Management and Administration

**T Level outline content: draft final
version**

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Contents

Introduction	3
Outline content for T Levels:	
Business and Administration core content	5
Occupational specialist content:	13
- Business Improvement	
- Team Leadership/Management	
- Business Support	
- Information Management	

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Introduction

Outline content

This outline content has been produced by [T Level panels](#) of employers, professional bodies and providers, and is based on the same standards as those used for apprenticeships. The outline content will form the basis of the specifications for T Level Technical Qualifications, which will be developed by awarding organisations for approval by the Institute for Apprenticeships and Technical Education. One awarding organisation will be appointed to develop and deliver each Technical Qualification following a procurement process.

Colleges and other education and training providers will decide how to structure the T Level courses they offer, based on the qualification specifications. This will enable them to deliver the study programme's mandatory components in the most effective way for students.

A T Level programme consists of a Technical Qualification, substantial industry placement, English and maths, and other occupation-specific requirements where essential for entry to skilled employment. This outline content relates solely to the Technical Qualification part of a T Level programme.

Further information about T Levels is available on the website of the Institute for Apprenticeships and Technical Education here: www.instituteforapprenticeships.org, and at www.education.gov.uk.

Business and Administration: Management and Administration

Awarding organisations will need to ensure that students have an up-to-date knowledge of the legal and regulatory obligations relating to employment in the occupations relevant to the T Level, and understand the practical implication of these on their work.

Maths, English and digital skills are set out in a separate annex. Awarding organisations should integrate these within the qualification so that they are applied in occupationally relevant contexts.

Core content

The core content relates to the whole route 'route core', and the pathway that the Technical Qualification covers 'pathway core'. The core knowledge and understanding is assessed through an examination and core skills through a practical employer-set project.

The core knowledge and understanding focuses on the students' knowledge and understanding of contexts, concepts, theories and principles relevant to the T Level. This could include, where appropriate, assessment of knowledge and understanding relevant to the route and the pathway.

The employer-set project provides the opportunity to develop and apply a minimum range of core skills important for employability. The allocation of content to each type of assessment will need to be approved by the Institute for Apprenticeships and Technical Education.

Core knowledge and understanding across Business and Administration Route

Element	Content
Business Context	<ul style="list-style-type: none"> • The different types of organisations (e.g. private, public and not-for-profit) and the environments in which they operate both nationally and globally. • The impact of organisations on society and the environment, including: <ul style="list-style-type: none"> ○ Economic growth and revenue and profit generation, locally, nationally and globally; ○ Social impact including: <ul style="list-style-type: none"> ▪ Corporate Social Responsibility (CSR); ▪ promoting equality and diversity; ▪ social mobility; ▪ ethical financing; ▪ anti-slavery and human trafficking; ▪ ethical working conditions; ▪ environment including sustainability. • Different forms of legal entities that organisations can form such as partnership, limited company, charity etc. • How and why organisations set objectives and strategies for achieving them. • How size, purpose and sector have an impact on organisations including: <ul style="list-style-type: none"> ○ Business models and structures; ○ Operations and functions (e.g. finance, Human Resources); ○ The roles within these organisations (e.g. CEO, Finance Director) and how and why they differ. • The different forms of governance that operate in organisations and how these relate to organisations' size, purpose, legal constitution and regulatory environment including: <ul style="list-style-type: none"> ○ Policy and reporting; ○ Oversight (e.g. Board of Trustees, Board of Directors). • The main legislative and regulatory frameworks that apply to organisations including: <ul style="list-style-type: none"> ○ Those relating to privacy, data protection (for example, GDPR), equality, information security and health and safety;

	<ul style="list-style-type: none"> ○ Those relating to environmental and sustainability legislation and frameworks; ○ Those relating to anti-bribery and anti-competitive regulations; ○ The role of regulatory bodies. ● The different types of internal and external stakeholders (for example, trade unions, investors and shareholders) and customers and how their needs and priorities influence the way organisations operate. ● How current and emerging digital technologies impact on the way businesses operate and how this is changing; for example Artificial Intelligence (AI), robotics and big data. ● Organisational cultures and values, how and why they vary, and how they are expressed externally and internally, both overtly and in reality. For example: <ul style="list-style-type: none"> ○ Externally through branding and mission statements; ○ Internally through expectations of employees such as dress and behaviour codes; ● The different ways and channels through which organisations communicate internally and externally (for example, emails, intranet, press releases, social media)
People	<ul style="list-style-type: none"> ● The legislation which governs the employee lifecycle from recruitment to termination, for example health and safety, duty of care, equality legislation. ● The ways in which different types of organisations ensure that they have the right people to meet their business aims including through deploying different recruitment channels and employment contracts. ● The value and benefits of an equal, diverse and inclusive workforce to an organisation, such as enhancing: <ul style="list-style-type: none"> ○ Creativity; ○ Reputation; ○ Retention; ○ Staff motivation; and ○ Reducing 'group think.' ● The importance and impact of employee well-being and resilience in organisations and how this is fostered and monitored.

	<ul style="list-style-type: none"> • Different approaches to the way people are managed including: <ul style="list-style-type: none"> ○ Those dictated by organisational ways of working such as matrix and hierarchical; ○ Those relating to personal preferences or organisational leadership styles such as autocratic or collaborative; ○ Remote and dispersed working; ○ Outsourced workers. • How organisations ensure that individuals develop the skills they need to contribute effectively to the organisation and its changing needs, including through: <ul style="list-style-type: none"> ○ Induction; ○ Feedback and performance reviews; ○ Learning development plans (e.g. CPD) and goals; ○ Internal and external training and on the job learning; ○ Coaching and mentoring. • Working as part of a team, including: <ul style="list-style-type: none"> ○ The different types of teams and collaborative groupings (e.g. internal and those involving different functions and stakeholders); ○ The different roles in a team; ○ Team dynamics and the impact they can have. <p>The importance of all team members taking responsibility for developing each other to achieve shared goals and the formal and informal ways this is done.</p>
Quality and Compliance	<ul style="list-style-type: none"> • The importance of maintaining and improving quality in all aspects of public and private sector organisations. • How quality is measured in different sectors such as manufacturing and care services for example, through quality standards such as: <ul style="list-style-type: none"> ○ ISO accreditations; ○ Those relating to people such as Investors in People and Investors in Diversity. • The role of regulatory bodies and inspections.
Finance	<ul style="list-style-type: none"> • Common terms used in financial reporting such as turnover and profit and loss.

	<ul style="list-style-type: none"> • Sources of finance for different types of organisations including: <ul style="list-style-type: none"> ○ Internal funding such as retained profit; ○ External funding such as private equity, grants, crowd-funding etc. • Different forms of expenditure including: <ul style="list-style-type: none"> ○ Staffing costs (including salary and related costs such as national insurance and pension); ○ Capital expenditure such as machinery and equipment; ○ The difference between fixed and variable costs and what influences each. • How revenue and expenditure (including cash and profit) are tracked and controlled including through: <ul style="list-style-type: none"> ○ Double entry bookkeeping; ○ Budgeting; ○ Reporting, including balance sheets and profit and loss accounts; ○ Setting spending limits; ○ Auditing.
Policies and procedures	<ul style="list-style-type: none"> • How organisations develop policies and procedures and why, including: <ul style="list-style-type: none"> ○ The policies and procedures that organisations develop and implement in order to comply with their legal and regulatory obligations and how and why the impact of these is assessed. ○ Non-mandatory policies and procedures. • How and why organisations develop Key Performance Indicators (KPIs), how they are measured and their impact on individuals' roles.
Project and change management	<ul style="list-style-type: none"> • What drives change, for example: <ul style="list-style-type: none"> ○ External changes - political, economic, social, technological, legal and environmental (PESTLE); ○ Changes in organisational priorities. • Why organisations need to make continuous improvements and innovations. • The common change management theories and models (for example, Kotter's change model, nudge theory, Kubler-Ross, Lewin).

	<ul style="list-style-type: none"> • The main project management approaches, their similarities and differences, and when and why they might be used (for example, Agile and Prince). • How projects are defined, structured, reported on and measured depending on the project management methodology used, and how technology can support this (for example, through collaboration tools, project dashboards). • How to support and improve projects through research, evidence and evaluation methods.
Business behaviours	<ul style="list-style-type: none"> • The importance of good communication and adapting social communication styles to professional standards and according to purpose, medium and audience, including: <ul style="list-style-type: none"> ○ Oral (such as speaking, active listening, asking questions and building relationships); ○ Written (such as emails, reports, forms, on-line content and presentations); ○ Body language and self-awareness. • The importance of self-management and how this impacts on the organisation and the individual, including: <ul style="list-style-type: none"> ○ Resilience; ○ Time-management and punctuality; ○ Self-development including understanding of own learning style, emotional intelligence and unconscious bias; ○ Meeting objectives; ○ Adaptability and flexibility; ○ Prioritisation; ○ Accountability; ○ Decision-making and escalation; ○ Giving and receiving feedback. • The importance of individuals' adapting their behaviour to the expectations and policies of the organisation including through compliance with codes of conduct and ethics. • The importance of acting with integrity and building trust with stakeholders and colleagues.

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Employer-set project

The employer-set project ensures students have the opportunity to combine core knowledge and skills to develop a substantial piece of work in response to an employer-set brief. The employer-set project forms part of the Technical Qualification and is a separate part of the T Level programme to the Industry Placement.

To ensure consistency in project scope and demand, awarding organisations will develop assessment objectives, which require students to:

- plan their approach to meeting the brief
- apply core knowledge and skills as appropriate
- select relevant techniques and resources to meet the brief
- use maths, English and digital skills as appropriate
- realise a project outcome and review how well the outcome meets the brief

The awarding organisation will work with a relevant employer or employers, to devise a set brief that:

- ensures a motivating starting point for students' projects, for example, a real-world problem to solve
- ensures students can generate evidence that covers the assessment objectives
- is manageable for providers to deliver
- is officially approved by the awarding organisation and employer

For Management and Administration in achieving the assessment objectives and meeting the brief, students must demonstrate the following core skills:

- **Business context and commercial awareness**
 - e.g. conduct a PESTLE analysis to inform a change project.
- **Project management: plan, manage and evaluate a project using appropriate tools and methodologies**
 - e.g. introducing a new policy or training programme.
- **Communication: using a range of communication methods tailored to audience**
 - e.g. to internal and external stakeholders on business solutions; making a presentation to a customer.
 - Use IT packages to present documentation professionally.
- **Working collaboratively with others**
 - e.g. to develop content for an intervention; to develop feedback skills; managing and influencing stakeholders; considering the impact of proposed solutions on others; to develop a business improvement solution.
- **Applying a logical approach to problem solving, identifying and resolving issues, recording progress and proposing solutions**
 - e.g. undertaking a cost / benefit analysis of the introduction of new procedures; developing a creative or innovative business improvement solution.
- **Undertaking research**
 - e.g. identifying sources and obtaining information related to a project and / or customer requirements; interrogating, analysing and reporting on business data; create a briefing document for internal colleagues or supervisor to assist them in formulating specific advice.

- **Reflective practice**

- e.g. review performance and own behaviours for impact; identifying ways for improvement; quality outcomes.

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Occupational Specialist Content

Specialist content is structured into different occupational specialisms, which correspond to the apprenticeship standards listed on the relevant occupational map. Occupational specialisms ensure students develop the knowledge and skills necessary to achieve a level of competence needed to enter employment in the occupational specialism, and are organised around 'performance outcomes' that indicate what the student will be able to do, as a result of learning and applying the specified knowledge and skills.

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Occupational Specialist Content

Occupational Specialism: Business Improvement

Performance Outcome 1: Acquire and protect data to support the improvement process

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The different types of data available within the business environment together with their sources, how they are produced and how they can be integrated. • How to obtain, use and protect data including: <ul style="list-style-type: none"> ○ legal frameworks and requirements; ○ data acquisition and permissions; ○ correct use of data; ○ securing and protecting data using physical and electronic methods. • The principles of data collection including sampling, frequency, sources and techniques. • The principles of researching data including: <ul style="list-style-type: none"> ○ sampling theory; ○ data collection tools and potential sources of data; ○ data accuracy and verification; ○ differences between qualitative and quantitative data and their uses; ○ basic statistical techniques. 	<ul style="list-style-type: none"> • Identifies and sources suitable data for analysis. • Engages with Data Controllers to assess and agree the most appropriate methods to safely acquire data within legal and business frameworks. • Uses constructive questioning and active listening skills to acquire data. • Secures and protects different types of data, including the appropriate use of: <ul style="list-style-type: none"> ○ firewalls, virus protection, passwords and cyber security for electronic data; ○ secure rooms, safes and locked cupboards for physical data and backups of electronic data. • Uses appropriate tools to collect, collate and integrate data sets, including electronic and physical data. • Checks and verifies data to ensure it is complete, accurate, appropriate and of good quality. • Uses different techniques and metrics to accumulate and measure various types of data produced by businesses.

- Why businesses need to measure outputs and performance and how measurement can be used to indicate change and improvement, including:

- basic measurement techniques such as observation, counting, estimating, surveys, interviews, voice of the customer, system generated data;
- methods of assessment including time series data, historical comparisons, benchmarking, competitor analysis.

- Selects and uses the most appropriate measuring and analysis techniques when assessing different business functions.

Performance Outcome 2: Analyse data to identify opportunities for improvement

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The various processes employed when preparing, analysing and presenting data. • The importance of providing good quality data analysis and interpretation, including through: <ul style="list-style-type: none"> ○ the use of different specialisations such as data collection, research, statistical analysis, programming, interpretation and graphical analysis e.g. histograms; ○ obtaining different views of data and results including their importance and interpretation. • Different methods of combining and integrating data including de-duplication, error checking and verification. • Basic statistical techniques including standard deviation, correlation, trend analysis and graphical presentation and how to apply them to data sets. • Different techniques for identifying, assessing and resolving problems when acquiring, analysing and understanding data. • How to interpret data analysis results in the context of a business to identify opportunities for improvement including: <ul style="list-style-type: none"> ○ quantitative and qualitative data analysis; ○ gap analysis for opportunities; 	<ul style="list-style-type: none"> • Prepares comprehensive data analysis plans showing the steps, time and involvement required for data acquisition, collation, analysis, interpretation and presentation. • Selects and extracts relevant data from wider, or large, data sets. • Combines different data sets, checking for errors and duplicates. • Identifies and resolves problems with data collection, analysis and interpretation. • Uses appropriate statistical techniques for analysing different types of product/process performance data correctly e.g. root cause analysis; graphical analysis. • Shows how data analysis results could be interpreted, including the use of scenarios, modelling and options to identify opportunities for improvement. • Prepares and delivers meaningful presentations of data analysis results and their interpretation.

- root cause analysis;
- data modelling systems and techniques;
- using and combining different data sets;
- developing scenarios and options;
- benchmarking comparisons;
- problem and goal statements.

- How to prepare and present data analysis results and interpretations including:

- placing results in the business context;
- preparing written reports;
- preparing graphics and animations.

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Performance Outcome 3: Engage stakeholders in discussions on business processes and improvement

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How stakeholder mapping shows the influence of different stakeholders, information requirements, frequency and preferred methods of contact. • Different models and theories for introducing change management and improvements in a business, for example: McKinsey 7-S Model; Kotter's Theory; ADKAR Model. • Different structured approaches to the assessment and implementation of change management and their uses in implementing effective change in organisations, including: <ul style="list-style-type: none"> ○ flowcharting, process mapping and modelling; ○ change readiness assessments; ○ experimentation; ○ communicating the need for change and improvement; ○ facilitation of change; ○ engaging with stakeholders; ○ showcasing and walkthroughs; ○ sustainability. • The importance of building rapport with colleagues and managers. • The principles of performance measurement for improvement, including: <ul style="list-style-type: none"> ○ historical trends; 	<ul style="list-style-type: none"> • Identifies the key business functions and roles (for example, those responsible for managing, analysing, quality assuring and communicating the change) involved in the improvement processes. • Prepares stakeholder communications plans including stakeholder mapping, communications methods, messages and timings. • Uses constructive questioning and active listening skills to discuss areas for improvement and approaches to change. • Selects and uses appropriate communications media for stakeholders and business improvement, for example emails, social media, briefing notes. • Shows how using different change management models, theories and approaches can influence the outcomes for stakeholders and business change. • Facilitates meetings and discussions, providing constructive feedback, responding to challenges, overcoming conflict and resistance and escalating issues when necessary. • Builds trust with, and across, teams at all levels using effective negotiating, influencing and escalating skills. • Uses appropriate communications media to inform stakeholders about change techniques and improvements. • Uses performance measurement and process mapping techniques to show how organisations can change and sustain improvement over time.

<ul style="list-style-type: none">○ observation, software monitoring, productivity levels, system generated data;○ benchmarking and competitor analysis. ● The principles of negotiating with, and influencing, colleagues and other stakeholders at all levels, including building trust, overcoming conflict and resistance. ● How to prepare and present to stakeholders including:<ul style="list-style-type: none">○ placing business change in context;○ preparing written reports;○ preparing graphics and animations;○ preparing and making presentations. ● How to raise concerns and when and how to escalate problems.	<ul style="list-style-type: none">● Prepares presentations and reports illustrating effective change management techniques.
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Performance Outcome 4: Identify, propose and plan solutions for improvement

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • Understand why the functions and roles within a business may need to evolve and change, including the impact of new legislation, technology, markets and competitors. • The legal aspects which may frame improvements including data protection, diversity and inclusion, gender balance, health and safety. • Different types of change management and business improvement processes, such as Six Sigma, Total Quality Management (TQM), Agile, Lean, Plan Do Check Act. • Approaches to measuring and controlling risks when implementing change and its outcomes. • Forming and leadership of business improvement teams, including selection, role allocation, agreeing goals, personal growth plans, tasks and timing. • The principles and tools used for managing change projects including tasks, budgets, resources, timing, scheduling, systems, section matrix and scoping tree. • The different techniques for identifying, assessing and resolving problems and risks, including interim containment actions, when assessing ideas and preparing proposals for 	<ul style="list-style-type: none"> • Prepares detailed proposals for change initiatives based on data analysis and interpretation, including: <ul style="list-style-type: none"> ○ current situation; ○ justification for improvement; ○ areas to be changed; ○ recommendations; ○ alternative approaches; ○ success criteria. • Prepares comprehensive plans including goal statements for the introduction of change management processes, including scope, tasks, resources and teams, budgets, timing and scheduling. • Forms, leads and develops teams focussed on improving business performance using improvement processes e.g. lean. • Presents change management proposals and plans, managing subsequent discussions and challenges, conflict and resistance. • Identifies and resolves problems and risks with proposals for business improvement, including assessment of the problems and risks, methods of resolution and escalation. • Coaches team members in communicating and using effective business improving techniques.

improving business processes e.g. brainstorming.

- The principles of negotiating and influencing colleagues and other stakeholders at all levels, including building trust, overcoming conflict and resistance.
- Different techniques for coaching people in business improvement, including asking good questions, guiding conversations, SMART goals, GROW model.
- How to prepare and present plans and proposals on business improvement including:
 - preparing written proposals;
 - developing comprehensive plans;
 - preparing graphics and animations;
 - preparing and making presentations.

Performance Outcome 5: Monitor and report the implementation of business improvement activities

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The principles of monitoring the implementation and outcomes of change initiatives, including preparation of plans, implementing change, reporting, escalation. • The potential risks and issues that may affect a change initiative and how to resolve them. • The different methods and metrics of measuring business performance including: <ul style="list-style-type: none"> ○ basic measurement techniques for example observation, counting, estimating, surveys system generated data, monitoring software; ○ methods of assessment such as time series data, historical comparisons, benchmarking, competitor analysis, control charts, dashboards, discrete data. • The performance and change management cycle, including plan, implement, monitor, review. • Approaches to support the continuous improvement of operational performance such as capability analysis and continuous data. • Preparation and presentation of progress reports on improvement initiatives and their outcomes, including: 	<ul style="list-style-type: none"> • Monitors business performance including through benchmarking, analysing the results and their interpretation for change improvement initiatives. • Prepares comprehensive project plans for the introduction of improved business processes, including: tasks, resources and teams, budgets, timing and scheduling. • Prepares and presents business performance reports and their interpretation, managing subsequent discussions and challenges and conflict. • Presents business improvement project progress reports, managing subsequent discussions, challenges and conflict. • Facilitates business improvement progress meetings, managing subsequent discussions, challenges, conflict, resistance and escalation. • Identifies and resolves problems, risks and issues in business improvement projects including through: <ul style="list-style-type: none"> ○ assessing problems, risks and issues; ○ deploying methods of resolution and mitigation; ○ escalating appropriately. • Introduces and negotiates adjustments to agreed plans and approaches that are adaptable to the changing needs of the business.

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| <ul style="list-style-type: none">○ preparing written monitoring and progress reports;○ preparing graphics and animations to illustrate performance;○ preparing and making presentations on performance and improvements. | |
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Occupational Specialism: Team Leadership/Management

Performance Outcome 1: Lead, manage and develop individuals and teams to deliver outcomes

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The difference between leadership and management. • Why leadership is important. • The role of leaders in setting organisational direction and strategy and how this is translated into divisional and functional strategies and plans. • Understand different leadership styles, for example, transformational and situational, and how they affect: <ul style="list-style-type: none"> ○ methods for providing direction, implementing plans and motivating people; ○ productivity and performance. • Awareness of structured approaches to managing change within a team, such as Kotter, Lewin's Change model, Mckinsey 7 S model. • How the way change is managed can impact on teams and individuals. • Why it is important for team leaders to model expected values and behaviours. • The importance of coaching and training and: 	<ul style="list-style-type: none"> • Is aware of own leadership style and how this impacts on those they work with. • Adapts own leadership style as appropriate in response to reactions from other individuals. • Reflects on own performance, seeks feedback, understands why things happen, and makes timely changes by applying learning from feedback received. • Communicates strategy and team purpose, adapting style to suit the audience. • Uses appropriate coaching techniques including: <ul style="list-style-type: none"> ○ active listening; ○ questioning; ○ finding strengths; and ○ assuming objective/ non-judgemental stance. • Manages competing priorities. • Manages own time effectively through the appropriate use of time management tools and techniques. • Supports effective organisational delivery through the identification and use of planning tools, such as Affinity

- the difference between coaching and training;
- how coaching supports the development of teams and people and improves engagement and motivation;
- effective coaching techniques and processes, for example, GROW model or Initiation, Observation and Action, Reflection and Evaluation.
- Why effective time management is important for organisations, teams and individuals.
- A range of time management tools and techniques and the circumstances and ways in which they should be used.
- Prioritisation theories and when and how they can be used such as Urgent vs Important grid, Eisenhower Matrix.
- How to use a range of planning tools and techniques such as GANTT charts, digital calendars and task managers.
- An understanding of equality, diversity and inclusion theory, including inclusive leadership, unconscious bias and reverse mentoring.
- The key characteristics of an inclusive workplace and how equality and inclusion can be achieved through leadership.

- diagrams, fishbone diagrams, GANTT charts, Process Decision Program Charts and Interrelationship diagrams.
- Uses a range of planning tools and techniques appropriate to the situation.
 - Promotes equality of opportunity and anti-discriminatory practice.
 - Uses an understanding of the different stages of team development to ensure a cohesive team and that their objectives are met.
 - Sets team and personal goals and objectives and appropriate approaches to measuring and monitoring them.
 - Maximises the effectiveness and productivity of team through performance review techniques.

- How legislation and responsibilities regarding equality and diversity and duty of care relate to the team supervisor role.
- Team development stages, for example:
 - Tuckman's model;
 - Forming, Storming, Norming, Performing.
- Team management models including team dynamics and motivation techniques.
- The concept of a high performing team and the techniques that can be deployed to create one.
- An understanding of different contributions to a team and theories of team roles such as Belbin's.
- Performance management techniques including:
 - setting Key Performance Indicators (KPIs) and metrics;
 - appraisals;
 - 360 degree feedback;
 - objective and goal setting;
 - performance management frameworks;
 - personal development plans;
 - providing constructive feedback.
- The business benefits of cross-functional team working and how to facilitate this to support the delivery of organisational objectives.

- The legislative and regulatory frameworks that influence people management including data protection, employment law and union recognition.
- People related data and the systems used to record and store such data; for example, absence management and performance management.
- The types of systems used for people management including:
 - HR systems;
 - the legislative regulations that cover such systems: for example, those covering data protection and the storage of personal sensitive data;
 - the legal aspects of HR such as requirements for making reasonable adjustments and the management of lateness, absence and poor performance;
 - Organising people resources for example employee schedules and resource allocation.
- Managers' legal responsibilities towards their staff: for example; safeguarding, health and safety.
- Performance management systems and typical governance arrangements: for example, quarterly and annual reviews.

Performance Outcome 2: Build relationships with colleagues, customers and stakeholders

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How to create a stakeholder map including: <ul style="list-style-type: none"> ○ mapping relationships between stakeholders and the organisation's objectives; ○ analysing stakeholders by perspectives, impact and influence; ○ identifying the best techniques for engaging with each stakeholder group. • The importance of emotional intelligence, its characteristics and how it can be developed and measured. • How to use emotional intelligence and conflict management techniques to manage stakeholder relationships. • The importance of understanding different learning styles and the use and impact of different feedback mechanisms. • The different forms of formal and informal communication and their application, including: <ul style="list-style-type: none"> ○ written communication such as emails, social media, letters; ○ oral communication such as telephone conversations and presentations. 	<ul style="list-style-type: none"> • Develop a stakeholder map for a familiar organisation which outlines both primary and secondary stakeholders. • Engages and communicates with stakeholders through a variety of media. • Constructs detailed and realistic plans for developing stakeholder relationships. • Understands and develops own emotional intelligence, for example through reflective practice. • Clearly communicates key messages in writing, digitally and orally including through presentations. • Demonstrates active listening in discussions with colleagues and stakeholders. • Provides constructive feedback. • Develops clear meeting agendas with timings. • Chairs meetings ensuring that: <ul style="list-style-type: none"> ○ the agenda runs to time; ○ all participants are encouraged to contribute; ○ any conflicts are dealt with appropriately; ○ actions and decisions are summarised and noted.

- The kinds of challenging conversations that can arise in the working environment (for example contraventions of codes of conduct, breaches in data protection rules, or performance management issues), and how to handle them.
- Why it is important to provide constructive feedback and how to do this.
- The kinds of concerns that should be escalated, such as financial irregularities, modern slavery, grievances, safeguarding, duty of care, equality and diversity, welfare, health and safety issues.
- How to escalate concerns appropriately, including through whistleblowing.
- The different roles in meetings (organiser, chair, note-taker, participant) and how to undertake each role effectively.

- Produces clear and concise meeting notes with actions that are easily identifiable.

Performance Outcome 3: Deliver core operational tasks and plans

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How organisational strategy is developed using tools such as a PESTLE and SWOT analysis. • How to set clear goals, using the SMART approach. • How to interpret, communicate and cascade strategy. • The principles of data management and the use of different technologies in business. • How organisations use data to gain insight into their customers' behaviours to inform business decisions. • The processes for collecting, validating, storing, protecting, and processing data. • A range of technologies to support the acquisition and management of data. • Tools and techniques to support decision making such as market research, cost-benefit analysis, SWOT analysis and feasibility studies. • A range of techniques and tools to support problem solving and how to use them, including Problem Cause Identification tools such as: <ul style="list-style-type: none"> ○ Root cause analyses; ○ Fishbone diagrams; ○ Interrelationship diagrams; 	<ul style="list-style-type: none"> • Develops plans to cascade strategy through the team. • Translates goals into deliverable actions and sets up processes for monitoring outcomes. • Uses data management tools competently and as appropriate to the situation. • Produces measurable Key Performance Indicators that demonstrate how successful an organisation is in meeting its objectives. • Analyses problems using a range of tools and techniques. • Makes decisions through following the stages of: <ul style="list-style-type: none"> ○ identifying the problem; ○ investigating possible solutions; ○ utilising data and feedback; ○ agreeing action; ○ escalating where appropriate; ○ monitoring outcomes. • Creates well-structured, clearly written reports suitable for the intended audience, making good use of data to support decisions and conclusions.

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| <ul style="list-style-type: none">○ Mind mapping;○ Appreciative inquiry;○ Lateral thinking;○ Idea generation approaches. <ul style="list-style-type: none">● How to analyse data to support business decision making. | |
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Performance Outcome 4: Manage and implement projects

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The phases of the project lifecycle such as initiation, planning, execution, monitoring and control and close/review. • The roles and responsibilities of project team members including: Project Manager, Project Team Member, Project Sponsor, Executive Sponsor. • How to determine and manage project resources and budgets, including people, equipment, materials, knowledge. • How to identify and manage risk as part of Project Management. • The risk management process – Initiate, Identify, Analyse, Evaluate, Treat, Monitor and Review. • The content and purpose of risk, issue and decision logs. • Project management tools and when to utilise them, including Gantt Charts, task management and real time dashboards. • How to ensure costs are controlled and outcomes evaluated, and the kinds of organisational and compliance requirements that can govern these. 	<ul style="list-style-type: none"> • Plans and monitors projects to delivery, taking corrective action where necessary. • Determines the resources needed to deliver against the project plan. • Identifies and manages risks. • Proficient in the use of common project management tools used in the different phases of the project lifecycle. • Drafts budgets, instigating appropriate arrangements to monitor and control expenditure, taking account of compliance requirements.

Performance Outcome 5: Apply governance and compliance requirements

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none">• How to calculate return on investment and value for money, including where the application of financial values is difficult.• The annual budgeting cycle, including setting an annual budget and what to budget for.• How to monitor budgets using tracking and reporting tools to ensure efficiencies and that costs do not overrun.	<ul style="list-style-type: none">• Accurately calculates return on investment and value for money.• Identifies and justifies which of competing options provides the best return on investment.• Drafts a budget and sets up monitoring and control arrangements.• Identifies the main financial and legislative requirements and associated risks for an organisation.• Identifies and suggests recommendations in relation to health and safety, security, confidentiality of information.

Occupational Specialism: Business Support

Performance Outcome 1: Support the running of the organisation

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How and why organisations develop values, vision, mission, strategy and objectives. • The processes and tools to support: <ul style="list-style-type: none"> ○ the running of a business; ○ the business planning process; ○ the business objectives cycle; ○ monitoring and reviewing implementation and impact. • How to organise meetings and events including through: <ul style="list-style-type: none"> ○ developing and consulting on the agenda; ○ taking effective minutes and action logs; ○ arranging travel and accommodation and the factors to take into account when doing so. • How to produce a PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis. • Understanding of project management principles including: <ul style="list-style-type: none"> ○ the phases of the project lifecycle: initiation, planning, execution, monitoring and control and close/review; ○ the roles and responsibilities in project teams including: Project Manager, Project Team Members, Project Sponsors; 	<ul style="list-style-type: none"> • Uses a range of planning tools and techniques to develop business plans and business cases. • Takes accurate minutes and creates action logs. • Completes PESTLE analyses. • Uses relevant project management principles and tools to scope, plan, monitor and report on projects. • Breaks down an assigned task and identifies and uses the appropriate tools (software or paper-based) to complete the task. • Manages resources to include procurement of consumables and non-consumables. • Supports the organisation to be cost-effective through: <ul style="list-style-type: none"> ○ careful use of paper and other consumables; ○ looking for opportunities to reduce costs, for example in travel and accommodation. • Disposes of waste in a way that: <ul style="list-style-type: none"> ○ meets requirements for confidentiality; ○ recycles where possible; ○ is in line with relevant legislation for safe disposal.

<ul style="list-style-type: none">○ project management tools and when to utilise them, including Gantt Charts, task management and real time dashboards;○ how to determine and manage project resources, including people, equipment and materials;○ how to identify and manage risk as part of Project Management. <ul style="list-style-type: none">● The principles for waste management and sustainability used by organisations and the legislative frameworks that apply.● The kinds of concerns that should be escalated such as financial irregularities, compliance issues (for example, data protection breaches), modern slavery, customer complaints, health and safety issues.● How to escalate concerns appropriately, including through whistleblowing.● The principles of effective coaching and associated techniques; for example, GROW model or Initiation, Observation and Action, Reflection and Evaluation.	<ul style="list-style-type: none">● Recommends ways of reducing waste.● Escalates concerns appropriately.● Coaches others to perform tasks effectively.
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Performance Outcome 2: Organise and prioritise workloads and processes

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none">• The role and main features of formal and informal processes in different business functions and how they are developed and administered, for example customer data, billing, invoices and purchase orders.• The importance of accepting personal responsibility for own work and achieving tasks and projects on time.• Why effective time management is important for organisations, teams and individuals.• A range of time management tools and techniques and the circumstances and ways in which they should be used.• Prioritisation theories and when and how they can be used such as Urgent vs Important grid, Eisenhower Matrix.	<ul style="list-style-type: none">• Manages own time effectively through the appropriate use of time management tools and techniques.• Uses different time management tools to prioritise tasks.• Makes decisions and recommendations based on sound reasoning and evidence.

Performance Outcome 3: Recommend and deliver improvements to business practices

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • Why businesses need to measure outputs and performance and how measurement can be used to indicate the need for change and improvement. • The different types of data within the business environment, together with their sources and how they are produced. • How to map end-to-end business processes to identify areas for improvement. • How to interpret data analysis results in the context of a business to identify opportunities for improvement including: <ul style="list-style-type: none"> ○ quantitative and qualitative data analysis; ○ gap analysis for opportunities; ○ developing scenarios and options; ○ benchmarking comparisons. • The principles of best practice reviews and best practice sharing (for example, regular review meetings, benchmarking). • How to develop proposals for improving business processes, for example, articulating the business case; conducting analyses of business functions or competition; defining options and recommendations. 	<ul style="list-style-type: none"> • Applies a solutions-based approach to improve business processes and help define procedures through: <ul style="list-style-type: none"> ○ analysing different types of data to identify areas where business practices could be improved; ○ analysing problems using tools such as root cause analysis. • Suggests well-reasoned improvements to own and others work and processes. • Prepares presentations, reports and proposals recommending improvements. • Reviews the work of others to identify and share best practice through appropriate mechanisms.

- A range of techniques and tools to support problem solving and how to use them, including Problem Cause Identification tools such as:
 - root cause analyses;
 - fishbone diagrams;
 - interrelationship diagrams;
 - mind mapping;
 - appreciative inquiry;
 - lateral thinking;
 - idea generation approaches.

- The principles of negotiating and influencing colleagues and other stakeholders, at all levels, including: building trust, overcoming conflict and resistance.

Performance Outcome 4: Build and maintain positive internal and external stakeholder relationships

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • Understand the qualities that are valued by stakeholders and customers, including integrity, reliability, self-motivation, being pro-active and a positive attitude. • What is meant by professionalism and its characteristics such as ethics, appearance, demeanour, reliability, telephone etiquette, written correspondence, social media usage. • How to create a stakeholder map including: <ul style="list-style-type: none"> ○ identifying stakeholders; ○ analysing stakeholders by perspectives, impact and influence. • How to engage and foster relationships with suppliers and partner organisations. • How individuals are the organisation's representative when communicating with customers and stakeholders and the possible impact of poor or inappropriate communication. • The importance of structure, language and style in business communications how these can vary depending on purpose and medium used. 	<ul style="list-style-type: none"> • Develops stakeholder maps for both primary and secondary stakeholders. • Manages the expectations of stakeholders based on an understanding of their needs and perspectives. • Uses the appropriate tools and channels to communicate internally and externally. • Creates a range of business communications, including those utilising social media, with structure, content and style appropriate to purpose and audience. • Deploys appropriate skills and techniques to: <ul style="list-style-type: none"> ○ respond to problems and complaints; ○ communicate changes; ○ influence stakeholders.

- Awareness of different personality traits and the importance of adapting own behaviour in response to these.
- How to use software tools to communicate with stakeholders including through email, calendars, documents, internet and social media.
- Techniques for:
 - recognising and managing conflict;
 - negotiating and influencing;
 - dealing with problems and complaints.
- The impact changes can have on internal and external stakeholders and how and why this may vary.
- The importance of securing stakeholder buy-in in securing effective change in organisations.

Performance Outcome 5: Manage the business information flow

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The common information needs of organisations and how this is used; for example, market analysis, labour market intelligence, operational performance. • The communication channels used by businesses and how they operate (for example, meetings, emails, internet, intranet, social media). • Meeting and reporting cycles and how they are used to disseminate information in an organisation. • What is meant by information flow and how this operates in four directions: downward, upward, horizontally, and diagonally. • How information in an organisation is: <ul style="list-style-type: none"> ○ collected; ○ stored; ○ controlled; ○ secured; ○ retrieved; ○ disposed of. • How to use a variety of digital packages and systems such as word processors, spreadsheets, databases to write letters or emails, create proposals, perform financial processes, record and analyse data. 	<ul style="list-style-type: none"> • Designs processes for ensuring that information flows in a timely fashion to support the meeting cycle. • Produces accurate documents including emails, letters, reports, files, proposals and payments. • Maintains records and files for example, databases, paper files, customer records. • Selects the most appropriate digital or manual solutions to suit the business need. • Updates and records information and produces data analyses where required using appropriate software.

Occupational Specialism: Information Management

Performance Outcome 1: Understand the information needs of the organisation and service users

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The nature of information and the value of its various forms including primary and secondary sources, print and digital, current, semi-current and archival. • The nature of knowledge, intellectual capital and the social networks through which they are shared and exploited. • The nature of physical and information collections, how they are changing and how and why organisations develop policies relating to collections management and development decisions. • The regulations regarding information use such as copyright, intellectual property, licensing and data protection. • How efficient and secure information flows are a central factor in effective decision making, structuring and solving problems, process and communication. • How information flows between people and systems; for example through specialised software packages, meeting reports, internal communications. 	<ul style="list-style-type: none"> ○ Uses constructive questioning and active listening skills to understand and frame the information, access and organisational requirements of those using the information service. • Assesses the information needs of the organisation through: <ul style="list-style-type: none"> ○ documenting the information flow using flow charts or other visual means; ○ identifying the information types that are required, for example physical, electronic, confidential and financial; ○ identifying the sources of the information, internal or external; ○ interpreting and implementing policy and legal requirements for the holding and accessing of information, for example confidentiality and intellectual property rights. •

- How and why different sectors, organisations and business functions have different information needs and systems.
- The different types of information and resources (internal and external) required within a business environment, their sources, how they can be acquired and how they can be integrated and used.
- Users' needs and information-seeking behaviour and how different information services cater to different types of user.
- How characteristics such as age, disability and ethnicity might impact on users' requirements for accessing information.
- The impact of online environments/spaces and physical spaces on the provision of services to different users.

Performance Outcome 2: Organise and manage the access and display of resources

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How to monitor the effectiveness of the service and identify areas for improvement, e.g. use of metrics or gathering user feedback. • How to acquire information and physical resources including: <ul style="list-style-type: none"> ○ internal data (e.g. customer data); ○ purchasing (e.g. data from market research companies, journals); ○ research (online/offline); ○ performance measurements/metrics. • The limitations imposed on acquisitions, including budgets, timescales, logistics, space considerations and security. • How, where and why information can be stored in organisations using web based technologies (such as cloud storage), content management systems and collaborative tools (e.g. SharePoint). • How different physical artefacts should be stored; for example, light and temperature controls. • How to protect and preserve information and physical resources including through: <ul style="list-style-type: none"> ○ compliance with legal frameworks and requirements; ○ setting passwords and permissions; 	<ul style="list-style-type: none"> • Develops the service to meet organisational and user needs, for example, re-organising spaces and suggesting improvements to catalogues, reports and web pages. • Identifies and sources suitable information and physical resources. • Describes and arranges material/resources by observing and applying identified cataloguing standards in order to create online catalogues and other finding aids to meet users' needs. • Assesses the logistical requirements for transporting physical objects to and from the organisation such as archive documents, museum collections. • Undertakes regulation and compliance checking, communicating clearly any copyright restrictions, the relevance of intellectual property rights and reasons for not sharing personal or confidential data. • Uses physical and electronic mechanisms to prevent access to unauthorised data. • Performs preservation (analogue/physical and digital) practices to keep collections physically safe using institutional/sector guidelines. • Supports digital access in ways that meet a range of user requirements, for example adapting or providing additional resources to meet the needs of those with specific needs or disabilities or those for whom English is not their first language.

<ul style="list-style-type: none">○ firewalls, virus protection and cyber security measures;○ correct transportation, storage and packaging of physical resources;○ archiving, back-ups and disaster recovery processes;○ ensuring digital continuity and version control.● The principles of managing, cataloguing and recording information sets and physical resources including:<ul style="list-style-type: none">○ search terms and key words;○ tagging and labelling;○ grouping and cross-referencing.● The reasons that access to, or the use of, information and physical resources may be limited, such as copyright restrictions, intellectual property rights, organisational policy, licensing regulations.	<ul style="list-style-type: none">● Secures and protects analogue, physical and digital resources through the use of:<ul style="list-style-type: none">○ firewalls, virus protection, passwords and cyber security of electronic information;○ secure rooms, safes and locked cupboards to protect physical information and resources;○ protective equipment and environments to preserve physical information and resources.● Uses information management processes to store, manage and retrieve records and data to support collaboration, exploitation and the organisation's Information Management (IM) practices.
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Performance Outcome 3: Promote and enable the use of information and archive resources

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The value, impact and benefits of information and archive services to users. • The specific features of archives and media, their legal and historical value and archival principles. • Marketing and promotion techniques to: <ul style="list-style-type: none"> ○ attract and inform new users; ○ announce new collections and data sets; ○ encourage effective use of information and resources. • Ways of researching and accessing information and physical resources including: <ul style="list-style-type: none"> ○ use of different types of search engines; ○ catalogue and microfiche searches; ○ keyword and Boolean searches. • Approaches to training service users, taking account of their different needs, including in: <ul style="list-style-type: none"> ○ operations of systems, databases and catalogues; ○ safe use of systems and physical resources; ○ compliance with legal requirements and restrictions; ○ protection and preservation of physical resources; ○ searching and researching information. • Appropriate format and content for user guides and instructions. 	<ul style="list-style-type: none"> • Uses promotional techniques for resources so that users and potential users are aware of their value, impact and benefit, e.g. by curating collections and displays in effective ways. • Contributes to learning activities for specific audiences, e.g. inductions and events, catering to a variety of levels of knowledge and understanding. • Prepares marketing materials including leaflets, posters, videos, internet pages, blogs and social media announcements. • Prepares user guides and instructions to support users to safely access information and physical resources independently. • Supports users to identify, find, access and evaluate information using relevant approaches to meet the needs of different audiences. • Uses information provision to enable users to access materials, e.g. through lending books/artefacts, emailing documents, accessing original archives, signposting links to information and alternative sources. • Develops knowledge sharing with users, cultivating an environment where knowledge is freely shared and sought within a 'safe' environment, including online solutions.

- How to develop a culture of knowledge sharing and why this is important.

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Performance Outcome 4: Identify and select suitable information and physical resources following user queries and requests

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • The nature and value of research and how this can support organisations' objectives. • How to use questioning and active listening techniques to obtain information from service users. • The different types of requests that may be encountered, e.g. provision of a specific piece of data or identifying and collating information from a range of internal and external sources. • How to prepare initial search results and discuss the next steps with the requester, for example, providing summaries and categorisations as the basis for further discussion. • Why requests may need to be prioritised and how to do this, taking account of service level agreements and key performance indicators. • The reasons why a request for information may need to be rejected, modified or escalated (e.g., confidentiality) and how to communicate this. • How to conduct searches on systems, catalogues, databases, social media, the internet and information sets. • How to identify, collate, analyse and present data and information in response to user requests. 	<ul style="list-style-type: none"> • Uses enquiry techniques to clarify requests to ensure full understanding of the user's requirements and expectations. • Employs information retrieval techniques to identify and use relevant media and systems, e.g. searching online, databases, catalogues or physical stores and EDRMS (electronic document record management systems). • Searches web-based sources, including social media, to meet users' information needs (e.g. LinkedIn). • Acquires requested information from multiple sources internal and external to the organisation. • Selects and uses appropriate tools and technologies in researching, disseminating and presenting information, (e.g. databases, search engines, digital libraries, repositories and social media) to meet user needs. • Analyses and interprets data to meet information requests and solve user problems. • Communicates the outcomes of information requests, orally or written as appropriate.

Performance Outcome 5: Ensure the accuracy, validity and relevance of information held

Knowledge Specific to Performance Outcome	Skills
<ul style="list-style-type: none"> • How to evaluate existing services against benchmarks / standards / customer need, identifying any gaps in resources. • How to identify new or updated resources including version control, record management and renewals. • The means of acquiring, maintaining, disposing of and locating documents and records, in line with legal obligations. • The concept of digital continuity, ensuring original records are preserved as required. • The importance of maintaining accurate information describing collections and records, including: <ul style="list-style-type: none"> ○ catalogues; ○ labelling; ○ summaries; ○ source; ○ history and provenance. • How to verify new or unusual items or collections using several different sources including: <ul style="list-style-type: none"> ○ use of reliable internet sources; ○ statistical tests for data sets; ○ similar collections; ○ other organisations; ○ expert analysis; ○ historical records. 	<ul style="list-style-type: none"> • Evaluates the continued relevance of information and resources held in partnership with users. • Identifies gaps in resources where users' needs are not currently met. • Identifies newly available resources and where sources have been updated. • Implements processes for the acquisition of information and resources for example, following procurement rules and standard operating procedures. • Removes resources no longer used or needed or where there are duplications, relegating or removing these appropriately. • Confirms the accuracy and validity of information and records using appropriate sources. • Prepares accurate records of items acquired, archived and disposed of.

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