

**Pearson
BTEC Level 3 Diploma in
Campaigning (QCF)**

**Pearson
BTEC Level 3 Diploma in
Fundraising Practice (QCF)**

**Pearson
BTEC Level 3 Diploma in
Volunteer Management (QCF)**

Specification

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Qualification titles covered by this specification

This specification gives you the information you need to offer the Pearson BTEC Level 3 Diploma in Campaigning, Fundraising Practice and Volunteer Management (QCF).

Qualification title	Qualification Number (QN)	Qualification start date	Review date
Pearson BTEC Level 3 Diploma in Campaigning (QCF)	600/2549/9	01/08/2011	31/12/2013
Pearson BTEC Level 3 Diploma in Fundraising Practice (QCF)	600/2546/3	01/08/2011	31/12/2013
Pearson BTEC Level 3 Diploma in Volunteer Management (QCF)	600/2613/3	01/08/2011	31/12/2013

These qualifications have been accredited within the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website. They will also appear on the Learning Aims Reference Application (LARA), where relevant.

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique QCF reference number, which is listed in this specification.

The QCF qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson BTEC Level 3 Diplomas in Campaigning, Fundraising Practice and Volunteer Management (QCF)

These qualifications are nationally recognised. The Pearson Level 3 Diplomas in Campaigning, Fundraising Practice and Volunteer Management (QCF) have been approved as components for the Advanced Apprenticeship framework in Campaigning, Fundraising Practice and Volunteer Management. These units have been developed with Skills — Third Sector.

What is the purpose of these qualifications?

The Skills — Third Sector organisations (charities, social enterprises and voluntary organisations) play an important role in society, and the nation's economic long-term prosperity requires individuals to have the right skills to meet the demands of a changing economy.

Campaigning is about organisations or individuals trying to change things by influencing governments, companies or the general public. Campaigners do this to benefit society, to help people speak out or to raise awareness of issues. This Advanced Level Apprenticeship in Campaigning gives apprentices the knowledge and skills to be successful campaigners.

Fundraising is a key in Skills — Third Sector voluntary and community groups and the need for expertise in this area has never been greater. Funding from local, regional and central government sources has been cut dramatically and individual giving has also dropped. Organisations are looking for ways to improve their income streams from a diverse range of sources, developing workforce skills in this area through the Advanced Level Apprenticeship in Fundraising Practice is one crucial element of this process.

Volunteer managers in voluntary and community groups are also widely used across the public services. The health service in particular has many volunteer managers. Their role, again, is likely to become increasingly more important as changes are introduced into the health service to deliver cost-effective solutions for services that were previously provided by the state. This means that the demand for volunteer management skills will increase. The Advanced Level Apprenticeship in Volunteer Management will enable individuals to develop the skills to recruit, support and manage the citizens who volunteer their time and expertise to be more involved in delivering local services.

Who are these qualifications for?

These qualifications are for all learners aged 16 and above who are capable of reaching the required standards and who can work in a context that enables them to produce evidence to meet the standard. Centres are responsible for learners in their work settings. Learners aged 16 to 18 should be supervised so that they are not put in a vulnerable position.

Pearson's policy is that these qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualifications.

What are the benefits of these qualifications to the learner and employer?

These qualifications give learners opportunities to develop the skills that are important in charities, social enterprises and voluntary and community organisations. It is important that individuals employed in this sector have the right skills to make a difference to people in their communities.

What are the potential job roles for those working towards these qualifications?

Job title	Job role
Advocacy officer	This role often works closely with senior advocacy coordinators to design and deliver advocacy messages to decision makers and opinion formers, raise the profile of the organisation, monitor debates, identify opportunities to shape policy development, support regional programmes of work and help plan advocacy events.
Campaigns and communications officer	This role often includes assisting with the production of postal and digital communications, including leaflets and newsletters, e-newsletters, Twitter feeds and updates on social networking sites. It also includes delivering communications campaigns using disciplines such as social marketing and advertising.
Campaigns and information officer	This role includes developing key messages from information gathered via online research, attendance at meetings and consultations and discussions with supporters. A key part of the role is responding to relevant policy developments and developing networks with partner organisations and individuals.

Job title	Job role
Campaigns coordinator	This role often involves working in a team to design and plan new campaigns, including developing a strategy for the campaign, identifying sources of support and presenting the plan to relevant stakeholders to gain their support.
Campaign organiser	The purpose of this role is usually to develop campaigns with the goal of raising either money or awareness of an issue. It includes planning a schedule of work, recruiting, briefing and managing staff and/or volunteers to assist with campaign administration, identifying and cultivating supporters, preparing campaign materials and liaising and building relationships with relevant internal and external stakeholders.
Campaigns and policy officer	This role often develops campaigns with the goal of raising awareness of an issue. It includes monitoring policy decisions and responding by raising awareness among decision makers, identifying suitable figureheads to lead or be the face of campaigns, identifying and cultivating supporters, preparing campaign materials and liaising and building relationships with supporters of the cause.
Campaigns and public affairs officer	This role may monitor relevant political developments, identify issues of particular importance and advise on possible response and potential opportunities to influence parliamentary activity. Officers act as the first point of contact for politicians, researchers, policy specialists, think tanks, and members of the public when they contact the organisation, as well as assisting with the development of programmes of work, day-to-day administration and communications with supporter groups.

Job title	Job role
Campaigns involvement officer	The purpose of this role is usually to promote and enable effective participation in a campaign, ensuring supporters and other external stakeholders are able to become involved and assist with the campaign as appropriate.
Campaigns officer	This role can influence a variety of audiences both in person and in writing on the aims of the campaign, as well as communicating campaign ideas to internal team members and other key stakeholders.
Campaigns project officer	The role often includes planning work such as the help volunteers may offer the campaign, building networks and relationships with external and internal supporters, raising awareness through presenting the campaign's ideas at consultation events and public meetings, developing materials and administering the campaign.

What progression opportunities are available to learners who achieve these qualifications?

- 1 With support and given opportunities in the workplace, campaigning apprentices could choose to develop their career in one of the following specialist areas of campaigning:
 - community organiser
 - policy officer
 - parliamentary officer
 - press and media officer
 - research and policy officer
 - social marketing officer
 - social policy officer
 - within a niche or specialist area of campaigning (for example health promotion campaigns officer, environmental awareness campaigns officer, animal rights campaigns officer).

- 2 With support and opportunities in the workplace, Campaigning Apprentices could choose to progress to:
- Level 5 Higher Apprenticeship in Leadership and Management
 - Level 4 and 5 management qualifications, for example:
 - Level 4 Certificate in Leadership and Management Skills
 - Level 4 Certificate in Management and Leadership
 - Level 4 Diploma in Leadership and Management
 - Level 4 Diploma in Management
 - Level 5 Diploma in Management Coaching and Mentoring
 - Level 5 Diploma in Management
 - Level 5 NVQ Diploma in Management
 - Level 5 Certificate in Coaching and Mentoring in Management
 - other voluntary sector disciplines such as fundraising and managing volunteers, either via an Advanced Level Apprenticeship Framework or through professional qualifications (for example Institute of Fundraising qualifications).
 - higher education, including Foundation degrees and degrees.
 - with further experience and/or with further training or development, apprentices may be able to progress to roles such as:
 - advocacy advisor
 - campaigns and communication manager
 - charity or community ambassador
 - communication and advocacy manager
 - campaigns manager
 - campaign project manager
 - information and campaigns manager
 - media and campaigns manager
 - senior campaigns coordinator
 - senior campaigns officer
 - senior campaigns manager
 - senior campaigns and policy officer.

- 3 With support and opportunities in the workplace, campaigning apprentices can choose to develop their career elsewhere in the voluntary or political sectors. Possible roles that campaigning apprentices may wish to move to or undertake further training or development for include:
- communications and marketing officer
 - events officer
 - fundraising officer
 - volunteer manager.

What is the qualification structure for the Pearson BTEC Level 3 Diploma in Campaigning (QCF)?

The Pearson BTEC Level 3 Diploma in Campaigning (QCF) is a **61-credit** qualification that consists of **eleven** mandatory units **plus** optional units that provide for a combined total of 61 credits (where at least 36 credits must be at Level 3 or above).

Pearson BTEC Level 3 Diploma in Campaigning (QCF)					
Unit reference number		Mandatory group – all units must be taken	Credit value	QCF level	GLH
1	M/503/2297	Identify and prioritise issues on which to campaign	4	3	18
2	F/503/2305	Conduct research to support a campaign	4	3	12
3	L/503/2307	Understand campaign strategies	4	3	13
4	L/503/2310	Develop a campaign workplan	4	3	11
5	H/503/2314	Develop communications for a campaign	4	3	13
6	A/503/2318	Introduction to campaigning	5	2	40
7	M/503/2316	Monitor and evaluate a campaign	4	3	17
8	F/503/2322	Understand the nature and governance of the voluntary sector	4	3	37
9	R/503/2325	Understand values, ethics and safeguarding in the voluntary sector	3	2	26
10	J/503/2323	Understand effective partnership working between organisations	4	2	36
11	L/503/2324	Understand sustainability in voluntary sector organisations	4	3	30
Unit reference number		Option group 1 – 4 credits must be taken from this group	Credit value	QCF level	GLH
12	R/503/2311	Manage resources for a campaign	4	3	15
13	Y/503/2312	Mobilise a campaign team	4	3	16
14	D/503/2313	Maintain relationships integral to a campaign	4	3	14
15	K/503/2315	Coordinate materials and products for a campaign	4	3	13

Unit reference number		Option group 2 – 13 credits must be taken from this group	Credit value	QCF level	GLH
16	K/502/7986	Ensure your own actions reduce risks to health and safety	2	3	6
17	Y/503/3377	Speaking and Listening Skills	3	2	24
18	A/501/5163	Team working	3	3	23
19	M/501/3927	Budgeting for the Business	3	3	12
20	M/600/9600	Set objectives and provide support for team members	5	3	35
21	L/600/9636	Support team members in identifying, developing and implementing new ideas	4	3	20
22	F/600/9715	Make effective decisions	3	3	10
23	D/502/1599	Manage the work of volunteers	6	3	39
24	R/600/9010	Contribute to good working relationships	4	2	30
25	T/501/5162	Planning and reviewing learning	3	3	23
26	R/601/2540	Plan and organise an event	4	3	28
27	M/601/2528	Develop a presentation	3	3	15
28	F/600/9682	Build, support and manage a team	4	4	20
29	H/502/0129	Negotiation and Influencing	6	3	30
30	D/600/9804	Manage customer service in own area of responsibility	4	3	25
31	Y/501/5168	Project Management	4	3	30
32	A/505/7011	Working in administration	6	2	60
33	T/503/1538	Introduction to fundraising	4	2	30
34	T/503/2320	Introduction to managing volunteers	4	2	30

What is the qualification structure for the Pearson BTEC Level 3 Diploma in Fundraising Practice (QCF)?

The Pearson BTEC Level 3 Diploma in Fundraising Practice (QCF) is a **62-credit** qualification that consists of **nine** mandatory units **plus** optional units that provide for a combined total of 62 credits (where at least 38 credits must be at level 3 or above).

Pearson BTEC Level 3 Diploma in Fundraising Practice (QCF)					
Unit reference number		Mandatory group – all units must be taken	Credit value	QCF level	GLH
1	A/503/1539	Develop a plan for fundraising activities	6	3	6
2	M/503/1540	Implement a plan for fundraising activities	3	3	6
3	T/503/1541	Maintain and enhance relationships with supporters of your cause	6	3	6
4	M/501/3927	Budgeting for the Business	3	3	12
5	T/503/1538	Introduction to fundraising	4	2	30
6	F/503/2322	Understand the nature and governance of the voluntary sector	4	3	37
7	R/503/2325	Understand values, ethics and safeguarding in the voluntary sector	3	2	26
8	J/503/2323	Understand effective partnership working between organisations	4	2	36
9	L/503/2324	Understand sustainability in voluntary sector organisations	4	3	30
Unit reference number		Option group 1 – 12 credits must be taken from this group	Credit value	QCF level	GLH
10	A/503/1542	Know how to plan and implement local or community fundraising	6	3	20
11	F/503/1543	Know how to plan and implement fundraising events	6	3	20
12	J/503/1544	Know how to plan and support legacy fundraising	6	3	25
13	D/503/1534	Know how to plan and support corporate fundraising activity	6	3	25

Unit reference number		Option group 1 – 12 credits must be taken from this group (<i>continued</i>)	Credit value	QCF level	GLH
14	H/503/1535	Know how to plan and support the generation of grant income	6	3	20
15	L/503/1545	Know how to plan and support fundraising through electronic media	6	3	20
16	K/503/1536	Know how to plan and support the recruitment of donors using direct marketing media	4	3	20
17	M/503/1537	Support others in the achievement of fundraising work	4	3	20
18	Y/503/3153	Know how to plan and support major gift fundraising	6	3	20
Unit reference number		Option group 2 – 13 credits must be taken from this group	Credit value	QCF level	GLH
19	A/503/2321	Monitor the programme of work	3	3	15
20	T/503/2317	Evaluate the programme of work	4	3	25
21	K/502/7986	Ensure your own actions reduce risks to health and safety	2	3	6
22	L/601/7509	Contribute to safeguarding children, young people and vulnerable adults	3	3	18
23	M/600/9600	Set objectives and provide support for team members	5	3	35
24	L/600/9636	Support team members in identifying, developing and implementing new ideas	4	3	20
25	F/600/9715	Make effective decisions	3	3	10
26	D/502/0145	Managing and Developing Relationships in the Workplace	2	3	8
27	R/601/2540	Plan and organise an event	4	3	28
28	H/502/0129	Negotiation and Influencing	6	3	30
29	D/600/9804	Manage customer service in own area of responsibility	4	3	25
30	M/601/2528	Develop a presentation	3	3	15
31	F/601/6499	Support marketing activities	4	3	24
32	Y/501/5168	Project Management	4	3	30
33	A/505/7011	Working in administration	6	2	60

Unit reference number		Option group 2 – 13 credits must be taken from this group (<i>continued</i>)	Credit value	QCF level	GLH
34	A/503/2318	Introduction to campaigning	5	2	40
35	T/503/2320	Introduction to managing volunteers	4	2	30

What is the qualification structure for the Pearson BTEC Level 3 Diploma in Volunteer Management (QCF)?

The Pearson BTEC Level 3 Diploma in Volunteer Management (QCF) is a **57-credit** qualification that consists of **eight** mandatory units **plus** optional units that provide for a combined total of 57 credits (where at least 31 credits must be at Level 3 or above).

Pearson BTEC Level 3 Diploma in Volunteer Management (QCF)					
Unit reference number		Mandatory group – all units must be taken	Credit value	QCF level	GLH
1	Y/602/5290	Supervise and support volunteers	6	3	24
2	R/602/5286	Promote volunteering within your organisation and to volunteers	3	3	16
3	M/600/9600	Set objectives and provide support for team members	5	3	35
4	J/502/1645	Encourage and motivate volunteers	5	3	33
5	J/602/5284	Manage risk in relation to volunteers	5	3	24
6	T/503/2320	Introduction to managing volunteers	4	2	30
7	J/503/2323	Understand effective partnership working between organisations	4	2	36
8	L/602/5285	Managing volunteer agreements	2	3	8
Unit reference number		Option group 1 – at least 4 credits must be taken from this group	Credit value	QCF level	GLH
9	D/602/5291	Developing structures, systems and procedures to support volunteering	4	4	16
10	D/502/0145	Managing and Developing Relationships in the Workplace	2	3	8
11	K/502/7986	Ensure your own actions reduce risks to health and safety	2	3	6
12	F/600/9682	Build, support and manage a team	4	4	20
13	L/600/9586	Manage own professional development within an organisation	4	3	20

Pearson BTEC Level 3 Diploma in Volunteer Management (QCF)					
Unit reference number		Option group 1 – at least 4 credits must be taken from this group	Credit value	QCF level	GLH
14	Y/600/9669	Plan, allocate and monitor work of a team	5	3	25
15	L/601/7509	Contribute to safeguarding children, young people and vulnerable adults	3	3	18
16	A/503/2321	Monitor the programme of work	3	3	15
17	T/503/2317	Evaluate the programme of work	4	3	25
18	M/501/3927	Budgeting for the Business	3	3	12
19	H/502/0129	Negotiation and Influencing	6	3	30
20	D/600/9804	Manage customer service in own area of responsibility	4	3	25
21	R/600/9685	Manage conflict in a team	3	3	20
22	M/600/9628	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility	4	3	20
23	F/600/9715	Make effective decisions	3	3	10
24	Y/501/5168	Project Management	4	3	30
Unit reference number		Option group 2 – a maximum of 18 credits may be taken from this group	Credit value	QCF level	GLH
25	R/503/2325	Understand values, ethics and safeguarding in the voluntary sector	3	2	26
26	Y/503/3377	Speaking and Listening Skills	3	2	24
27	A/505/7011	Working in administration	6	2	60
28	A/503/2318	Introduction to campaigning	5	2	40
29	T/503/1538	Introduction to fundraising	4	2	30

How are the qualifications graded and assessed?

The overall grade for each qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

Assessment requirements/strategy

The assessment requirements/strategy for these qualifications have been included in *Annexe C*. They have been developed by Skills – Third Sector in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence (to be read in conjunction with the assessment guidance in *Annexe C*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on our website www.edexcel.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Pearson Online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on our quality assurance processes is given in *Annexe A*.

What resources are required?

Each qualification is designed to support learners working in the voluntary sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Staff assessing learners must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:					The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).
Unit reference number:					This is the unit owner's reference number for the specified unit.
QCF level:					All units and qualifications within the QCF have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry level to level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional.
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
Guided learning hours:					A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private study.
Assessment methodology:					This provides a summary of the assessment methodology to be used for the unit.
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

Pearson BTEC Level 3 Diploma in Campaigning (QCF)

Mandatory units

Unit 1: Identify and prioritise issues on which to campaign**Unit reference number:** M/503/2297**QCF level:** 3**Credit value:** 4**Guided learning hours:** 18

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand a campaigning context	1.1	Explain the purpose of, and motivation for the cause			
		1.2	Describe the environment and context of the cause			
		1.3	Describe the legal environment and rights of campaigners within the context of the cause			
		1.4	Describe the wider campaigning environment			
		1.5	Describe the impact the wider campaigning environment has on the organisation's current and future potential campaigning activity			
2	Identify issues on which to campaign	2.1	Assess the context for a campaign			
		2.2	Identify issues relevant to a campaign's beneficiaries			
		2.3	Explain the legitimacy of campaigning issues to self or the organisation			
		2.4	Determine whether the identified campaign issues are being addressed by another organisation or campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to prioritise issues on which to campaign	3.1	Explain how to identify issues of relevance to a campaign's beneficiaries			
		3.2	Describe factors to take into account when prioritising issues			
		3.4	Describe ways in which a decision-making process can be influenced			
		3.5	Explain the importance of agreeing with relevant stakeholders campaigning issues and their priority			
		3.6	Describe any factors and practical constraints impacting on a campaign			
		3.7	Explain whether a campaign is appropriately resourced to address the issues identified			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Assess the possible impact of a campaign	4.1	Identify those a campaign is seeking to influence			
		4.2	Assess the potential results, both positive and negative, of an identified campaign			
		4.3	Clarify the scale and range of change a campaign may help achieve			
		4.4	Assess the possible impact a campaign may have on supporters, beneficiaries and opponents			
		4.5	Clarify methods for evaluating the impact of a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Understand the needs of the organisation's beneficiaries	5.1	Explain how to identify the needs of the organisation's beneficiaries			
		5.2	Describe different ways of involving and consulting with the organisation's beneficiaries			
		5.3	Describe the advantages and disadvantages of involving those that will benefit from a campaign			
		5.4	Explain the merits of different methods of consultation			
		5.5	Describe the nature and extent of the organisation's responsibility to its beneficiaries, and where appropriate, its stakeholders			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 2: Conduct research to support a campaign

Unit reference number: F/503/2305

QCF level: 3

Credit value: 4

Guided learning hours: 12

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the aim of a campaign	1.1	Describe the change and impact that a campaign is seeking to achieve			
		1.2	Describe the environment and context of a campaign			
		1.3	Describe the audience of a campaign			
2	Determine the requirements for research	2.1	Describe the information needs of a campaign			
		2.2	Identify any gaps in information of relevance to a campaign			
		2.3	Confirm where research is necessary			
		2.4	Assess own or the organisation's capacity to conduct and/or commission research			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the importance of research to campaigns	3.1	Explain how research can influence the direction of a campaign			
		3.2	Explain the importance of maintaining objectivity when conducting research			
		3.3	Explain the difference between qualitative and quantitative techniques			
		3.4	Explain the difference between primary, secondary and participatory research			
		3.5	Describe the value of different research techniques to a given situation			
		3.6	Describe the methods for assessing relevant research sources			
		3.7	Explain how research can impact on the aims and objectives of a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Prepare to conduct research	4.1	Describe the resources available to conduct or commission research			
		4.2	Describe the advantages and disadvantages of using different research methodologies			
		4.3	Describe the advantages and disadvantages of using secondary sources			
		4.4	Describe the factors to take into account when selecting research methodologies			
		4.5	Assess the priorities for the research			
		4.6	Prepare a research brief or work plan, as appropriate			
5	Conduct research using appropriate techniques	5.1	Confirm role and responsibilities according to the research brief			
		5.2	Collect data using techniques identified in the research brief			
		5.3	Store collected data in the appropriate format and in preparation for analysis			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know how to analyse findings of the research	6.1	Explain how to assess the validity of relevant sources			
		6.2	Describe techniques for interrogating sources reliably and objectively			
		6.3	Describe techniques for analysing primary and secondary research			
		6.4	Describe techniques for weighting findings			
		6.5	Explain the importance of objectivity in analysing evidence			
7	Analyse and present the findings of the research	7.1	Analyse the finding of the research using appropriate tools and techniques			
		7.2	Gather appropriate evidence for a campaign			
		7.3	Record findings in an appropriate manner			
		7.4	Report objectively in a format suitable for the intended audience			
		7.5	Review campaign aims against the findings of the research			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 3: Understand campaign strategies**Unit reference number:** L/503/2307**QCF level:** 3**Credit value:** 4**Guided learning hours:** 13

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand campaigning	1.1	Define campaigning and a specific campaign			
		1.2	Describe key milestones in the history of campaigning			
		1.3	Explain how campaigns can impact on different sections of society			
		1.4	Describe the wider campaigning environment in relation to the organisation			
		1.5	Explain the importance of campaigning to the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand how campaigning strategies are developed	2.1	Explain the organisation's procedures for developing a new campaigning strategy			
		2.2	Describe the people responsible for developing campaigning strategy			
		2.3	Give examples of issues on which the organisation has chosen to campaign			
		2.4	Outline the operational process of turning a strategy into a campaign			
		2.5	Explain the outcomes the organisation sought to achieve through a specific campaign			
		2.6	Describe the factors to take into account when developing a campaign strategy, including resources, targets, audiences and possible opponents			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand methods and resources used in campaigns	3.1	Give examples of information sources for learning about campaigning techniques			
		3.2	Describe the differences between proactive, reactive and strategic campaigning			
		3.3	Explain the value, benefits and risks of collaborative working			
		3.4	Describe the legal implications and framework for campaigning and different campaigning techniques			
		3.5	Explain the importance of understanding the audience/s of a campaign			
		3.6	Describe the resources available for a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Assess methods to be used in a campaign	4.1	Analyse the success of recent campaigns			
		4.2	Assess methods used in the relevant campaign environment			
		4.3	Assess tools required to engage the audience/s			
		4.4	Assess the value of involving different types of stakeholders in a campaign			
		4.5	Assess the past effectiveness of specific campaign methods on different audiences			
		4.6	Assess the resources available for a campaign, including financial, human and partner organisations			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 4: Develop a campaign workplan

Unit reference number: L/503/2310

QCF level: 3

Credit value: 4

Guided learning hours: 11

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the vision and timescales for a campaign	1.1	Describe what a campaign wants to achieve and a campaign vision			
		1.2	Describe a campaign strategy and its aims and objectives			
		1.3	Outline the timescales for a campaign			
		1.4	Explain how the wider campaign environment impacts on the strategy			
		1.5	Explain how the strategy will be implemented at the operational level			
2	Understand the value of campaigning methods	2.1	Describe the audience/s of a campaign			
		2.2	Give examples of different campaigning methods			
		2.3	Explain how to assess the relevance of different campaigning methods to a campaign idea			
		2.4	Describe the challenges of using different campaign methods in a given situation			
		2.5	Explain the importance of assessing the costs and potential benefits of different campaign methods			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Establish resources available to a campaign	3.1	Identify the resources required for a campaign and any restrictions on their use			
		3.2	Confirm the resources for a campaign			
		3.3	Clarify roles and responsibilities for delivering a campaign			
		3.4	Communicate roles and responsibilities to others as appropriate			
		3.5	Identify colleagues to work with in a team			
4	Set tasks for a campaign	4.1	Identify specific activities and tactics to deliver a campaign			
		4.2	Clarify the deliverables for a campaign and how they will be achieved			
		4.3	Set priorities for the completion of tasks and activities			
		4.4	Identify tasks that are inter-dependent and plan ways of achieving them			
		4.5	Ensure there is a process in place for monitoring the campaign			
		4.6	Set objectives for monitoring and evaluating the campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Select campaigning methods	5.1	Select methods to reach the audience/s based on the resources available			
		5.2	Develop ways of communicating with targets and audiences that are accessible and relevant to their needs			
		5.3	Confirm the methods to be used at each stage of a campaign			
		5.4	Clarify own role in implementing campaigning methods			
		5.5	Assess the costs and possible benefits of the campaign methods chosen			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know how to minimise risks to a campaign	6.1	Describe internal and external factors that may impact on campaign objectives			
		6.2	Explain the possible impact of these factors			
		6.3	Explain the process for monitoring these factors and responding if they occur			
		6.4	Describe any actions that can be taken to minimise the impact of these factors			
		6.5	Explain how to conduct a risk assessment			
		6.6	Explain how to mitigate risks			
		6.7	Describe why it is important to ensure continuity and responsiveness in the delivery of a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Plan for delivery of a campaign's objectives	7.1	Identify actions to mitigate risks to a campaign			
		7.2	Develop a contingency plan to ensure the delivery of a campaign's objectives			
		7.3	Set outcomes for each campaign milestone that are in line with a campaign strategy			
		7.4	Record a plan for influencing audiences and targets			
		7.5	Communicate the plan to those responsible for engaging with audiences and targets			
		7.6	Review the work plan according to changes in a campaign environment and context			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Guided learning hours: 13

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand a campaign identity	1.1	Explain a campaign vision and its objectives			
		1.2	Explain the key messages to be communicated about a campaign			
		1.3	Give examples of the arguments opposing a campaign			
		1.4	Describe the audience/s for a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to develop coherent and effective messages	2.1	Describe the information needs of a campaign			
		2.2	Describe different communication tools, including online and offline			
		2.3	Explain the communication needs of own audience/s			
		2.4	Explain how to identify appropriate communication techniques for different audiences			
		2.5	Explain the importance of accuracy when developing campaign messages			
		2.6	Describe different techniques of communicating messages to audiences, including framing and focused messages			
		2.7	Describe the factors to take into account when developing campaign messages			
		2.8	Describe how to check that the messages are accurate and sympathetic to the audience/s			
		2.9	Explain who is responsible for approving campaign messages			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Develop campaign messages	3.1	Assess the information needs of a campaign			
		3.2	Assess the communications tools available to a campaign			
		3.3	Make use of feedback from beneficiaries in the development of campaign messages			
		3.4	Develop campaign messages of different lengths and levels of simplicity			
		3.5	Check campaign message to ensure they are accurate and that they meet any relevant legal requirements			
		3.6	Obtain authorisation for communicating campaign messages			
		3.7	Check campaign messages engage audiences in the way planned			
4	Know how to deal with information requests	4.1	Explain how to deal with information requests about a campaign			
		4.2	Explain how to deal with negative publicity and misinformation about a campaign			
		4.3	Explain how to deal with requests from the media to be involved in a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Understand the role of the media in a campaign	5.1	Describe the value and limitations of involving the media in campaigns			
		5.2	Outline the importance of monitoring media coverage of a campaign			
		5.3	Describe new and traditional forms of media used in campaigning			
		5.4	Describe the advantages and disadvantages of using different forms of media for a campaign			
		5.5	Describe situations where different forms of media may wish to become involved in a campaign			
		5.6	Explain how a specific form of media can help achieve a desired impact on a campaign audience			
		5.7	Explain why some forms of media are more suited to different audiences than others			
6	Monitor information on a campaign	6.1	Manage the receipt of responses to consultations and enquiries within appropriate timescales			
		6.2	Monitor any media coverage and record in an appropriate format			

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(if sampled)			

Unit 6: Introduction to campaigning**Unit reference number:** A/503/2318**QCF level:** 2**Credit value:** 5**Guided learning hours:** 40

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand campaigning	1.1	Define campaigning activities			
		1.2	Explain how campaigning activities overlap with fundraising and other voluntary sector activities			
		1.3	Describe the wider campaigning environment and the impact it can have on a campaign			
		1.4	Define the legal environment and rights and restrictions of campaigners			
		1.5	Describe the roles beneficiaries can play in a campaign and why their involvement may be important			
		1.6	Describe the advantages and disadvantages of collaborative campaigning			
		1.7	Describe the differences between proactive and reactive campaigning			
		1.8	Describe the importance of maintaining confidentiality in a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand campaign strategies	2.1	Describe the process for determining when a campaign is required			
		2.2	Describe the importance of SMART aims and objectives for a campaign			
		2.3	Describe the importance of research to a campaign			
		2.4	Describe the importance of developing a work plan for a campaign			
		2.5	Describe the importance of maintaining up-to-date knowledge of issues of relevance to a campaign, including other campaigns			
		2.6	Describe the importance of monitoring and reviewing a campaign as it progresses			
		2.7	Describe the importance of measuring the success and effectiveness of campaigns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand campaigning techniques, methods and audiences	3.1	Describe different types of campaigning techniques and methods and their advantages and disadvantages			
		3.2	Explain the importance of having campaigning techniques and methods that are relevant to campaign ideas			
		3.3	Describe the difference between campaign targets and audiences			
		3.4	Describe the importance of influencing targets and audiences			
		3.5	Describe types of campaign message			
		3.6	Describe ways of communicating campaign messages			
		3.7	Explain the importance of accuracy when developing campaign messages			
		3.8	Describe different types of materials and products that can be used in a campaign			
		3.9	Outline the role of the media in campaigning			

Learner name:	_____	Date:	_____
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(if sampled)			

Unit 7: Monitor and evaluate a campaign**Unit reference number:** M/503/2316**QCF level:** 3**Credit value:** 4**Guided learning hours:** 17

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand what a campaign is aiming to achieve	1.1	Describe the vision of a campaign			
		1.2	Explain a campaign strategy			
		1.3	Explain the objectives of a campaign			
		1.4	Describe a campaign work plan			
		1.5	Describe the environment in which campaigners operate			
		1.6	Explain a campaign issue			
		1.7	Describe the evaluation plan, its aims, objectives and audience/s			
		1.8	Describe the intended outcomes of a campaign			
2	Know how to identify other parties who have an impact on a campaign	2.1	Describe how to involve beneficiaries in an evaluation			
		2.2	Describe the key stakeholders in a campaign			
		2.3	Identify factors which may impact on a campaign, including other campaigns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Maintain information on a campaign	3.1	Maintain an understanding of the external campaigning environment			
		3.2	Update information on identified risks at regular intervals			
		3.3	Escalate information on identified risks as appropriate			
4	Understand monitoring and evaluating a campaign	4.1	Explain the importance of monitoring and evaluating a campaign			
		4.2	Summarise key concepts of monitoring and evaluation, including objectivity and causality			
		4.3	Explain how to deal with challenges relating to these concepts			
		4.4	Describe techniques and tools used in monitoring and evaluating a campaign			
		4.5	Explain different ways data resulting from monitoring and evaluation can be used			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Select tools and plan the evaluation	5.1	Explain what monitoring indicators are and how they are used to measure and evaluate performance			
		5.2	Describe the benefits of using monitoring indicators			
		5.3	Confirm the monitoring indicators to be used for a campaign			
		5.4	Confirm roles and responsibilities in the evaluation process			
		5.5	Set aside time in the work plan to conduct an evaluation			
		5.6	Plan a time within the overall campaign workplan to conduct an evaluation			
6	Conduct an evaluation of a campaign	6.1	Obtain information about a campaign using appropriate techniques			
		6.2	Record information about progress at designated intervals			
		6.3	Record in a suitable format key outcomes and outputs to inform the evaluation			
		6.4	Assess the impact of other, external influencing factors			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Report on performance	7.1	Produce monitoring reports in line with the work plan			
		7.2	Report performance to relevant stakeholders			
		7.3	Identify where changes and improvements can be made in the delivery of a campaign			
8	Know how to report findings of campaign performance	8.1	Describe the reporting requirements for communicating campaign performance			
		8.2	Explain the importance of honesty and objectivity in reporting			

Learner name: _____

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Date: _____

(if sampled)

Unit 8: **Understand the nature and governance of the voluntary sector****Unit reference number:** F/503/2322**QCF level:** 3**Credit value:** 4**Guided learning hours:** 37

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the structure of the voluntary sector	1.1	Explain the differences between the voluntary sector and the public and private sectors			
		1.2	Summarise the voluntary sector's contribution to wider and civil society			
		1.3	Summarise the types and structures of voluntary sector organisations			
2	Understand the policies and legislation that govern the sector	2.1	Explain how a specific voluntary sector organisation is held to account			
		2.2	Summarise policies and legislation currently affecting the voluntary sector			
		2.3	Explain how charity and employment law relate to the sector and a specific voluntary sector organisation			
		2.4	Explain how a specific organisation's mission, ethics and values are shaped or influenced by policies and legislation			
		2.5	Describe the risks faced by voluntary sector organisations when policies and legislation are not adhered to			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the governance of voluntary sector organisations	3.1	Describe the structure of a specific voluntary sector organisation's governing body			
		3.2	Explain why voluntary sector organisations have trustees and management committees			
		3.3	Describe the role of trustees and management committee members			

Learner name: _____ Date: _____

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Internal verifier signature: _____ Date: _____
(if sampled)

Unit 9: Understand values, ethics and safeguarding in the voluntary sector

Unit reference number: R/503/2325

QCF level: 2

Credit value: 3

Guided learning hours: 26

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand values and ethics in the voluntary sector	1.1	Define the mission of a specific voluntary sector organisation			
		1.2	Describe the values, ethics and beliefs of a specific voluntary sector organisation			
		1.3	Describe how different organisations' values, ethics and beliefs influence their practice			
2	Understand the importance of equality, diversity and inclusion in the voluntary sector	2.1	Define equality, diversity and inclusion			
		2.2	Describe the importance of promoting equality, diversity and inclusion within the voluntary sector			
		2.3	Describe a specific voluntary sector organisation's commitment to equality and diversity			
		2.4	Describe the equality and diversity policies and legislation relevant to the voluntary sector			
		2.5	Explain why voluntary sector organisations conduct equality impact assessments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand safeguarding in the voluntary sector	3.1	Explain the importance of safeguarding in the voluntary sector			
		3.2	Describe the safeguarding policies and legislation relevant to the voluntary sector and a specific organisation			
		3.3	Describe how a specific voluntary sector organisation safeguards its service users			

Learner name: _____ Date: _____

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Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 10: Understand effective partnership working between organisations**Unit reference number:** J/503/2323**QCF level:** 2**Credit value:** 4**Guided learning hours:** 36

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how partnership working can help an organisation achieve its mission	1.1	Summarise different types of partnership, including networks, consortia, collaborations and formal partnerships			
		1.2	Describe the benefits and risks of partnership working			
		1.3	Describe types of partners and ways partnership working may help achieve a mission			
		1.4	Describe the advantages and disadvantages of partnership working for organisations with a shared mission			
2	Understand how partnership working is governed	2.1	Describe the policies and legislation that apply to partnership working			
		2.2	Describe the legislation, codes of practice and protocols that apply to confidentiality, data protection and information sharing			
		2.3	Describe ways partner organisations share decision making			
		2.4	Explain when to seek informal and formal legal advice on partnership arrangements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to work in partnership with other organisations	3.1	Describe the principles of working with other organisations, including consortia and groups			
		3.2	Describe ways to develop positive working relationships with colleagues in other organisations			
		3.3	Describe different forms of communication and their uses, including new and interactive media			
		3.4	Explain the importance of recording communications with partner organisations			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 11: Understand sustainability in voluntary sector organisations

Unit reference number: L/503/2324

QCF level: 3

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand an organisation's position in the voluntary sector	1.1	Describe the services provided by a specific voluntary sector organisation and the users of those services			
		1.2	Explain how a specific voluntary sector organisation's work plan relates to its mission and values			
		1.3	Analyse ways in which a specific voluntary sector organisation measures its impact			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand how to sustain a voluntary sector organisation	2.1	Describe ways in which a voluntary sector organisation can expand its activities			
		2.2	Explain how a specific voluntary sector organisation plans the use of resources, including volunteers			
		2.3	Summarise the different ways a specific voluntary sector organisation funds its activities			
		2.4	Explain the importance of enterprise when raising funds			
		2.5	Explain the importance of working within a budget			
		2.6	Explain how improving the quality of services can help sustain a voluntary sector organisation			
		2.7	Summarise the latest trends, enterprise and innovative practices in the sector			
		2.8	Explain why it is important to remain up to date with trends and developments in the sector			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the importance of environmental sustainability in voluntary sector organisations	3.1	Describe the voluntary sector's role in promoting environmentally friendly business practice			
		3.2	Describe how a specific voluntary sector organisation promotes environmental sustainability			
		3.3	Describe environmentally friendly practices which could help voluntary sector organisations sustain their business			

Learner name: _____

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Date: _____

(if sampled)

Optional units

Unit 12: **Manage resources for a campaign**

Unit reference number: R/503/2311

QCF level: 3

Credit value: 4

Guided learning hours: 15

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the costs and timescales of a campaign	1.1	Describe the importance of working within a budget in a campaign			
		1.2	Explain how to assess the resources required to achieve campaign objectives			
		1.3	Explain how to resource and cost a campaign			
		1.4	Describe the factors that need to be taken into account when resourcing a campaign			
		1.5	Outline the timescales involved in a campaign			
		1.6	Describe the different types of resources available for campaigning			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know the resources and funds required for a campaign	2.1	Explain how to identify requirements for fundraising			
		2.2	Describe the different types of resources required for a campaign, including financial, non-financial, human and technical			
		2.3	Describe techniques for procuring funding			
		2.4	Explain the roles and responsibilities involved in running a campaign			
		2.5	Describe the skills required to deliver a campaign			
		2.6	Explain how to obtain the resources required for a campaign			
		2.7	Describe how to modify plans when the resources needed aren't available			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Obtain the appropriate non-financial resources for a campaign	3.1	Undertake an assessment of the non-financial resources required to achieve campaign objectives			
		3.2	Identify the non-financial resources that are available to deliver a campaign			
		3.3	Compare the non-financial resources available with the resource requirements			
		3.4	Obtain available non-financial resources from the appropriate source(s)			
		3.5	Check that the quality and quantity of non-financial resources is adequate to deliver a campaign			
		3.6	Deal with problems in obtaining non-financial resources to maintain campaign delivery			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Obtain financial resources for a campaign	4.1	Identify financial resources required for a campaign			
		4.2	Identify sources of finance available to a campaign			
		4.3	Determine any requirement for fundraising			
		4.4	Liaise with appropriate colleagues or stakeholders to confirm any fundraising goals			
		4.5	Propose fundraising techniques according to the resources available			
		4.6	Record a campaign's financial and fundraising requirements in an appropriate format			
		4.7	Present findings to decision makers, including plans for fundraising			
5	Collect information using appropriate techniques	5.1	Apply a chosen technique to collect information according to the work plan			
		5.2	Collate information in an appropriate format and save securely			
		5.3	Sort the information to remove errors, and for relevance			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know how to control resources	6.1	Give examples of the resources required for monitoring a campaign			
		6.2	Explain the importance of setting resources aside as a contingency			
		6.3	Describe the organisation's processes and procedures for making resources available to a campaign team			
		6.4	Describe how to check resource levels			
		6.5	Describe how to deal with a shortfall in resources			
7	Monitor resource levels for a campaign	7.1	Check resource levels regularly in line with organisational procedures			
		7.2	Make resources available to those involved in a campaign according to the work plan			
		7.3	Describe those responsible for using and monitoring the budget			
		7.4	Explain the implications of running over budget			
		7.5	Make contingency resources available in case of issues or unforeseen problems			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
8	Control resources for a campaign	8.1	Ensure that all resources are stored securely including information, data and physical resources			
		8.2	Monitor the use of resources using appropriate techniques			
9	Know how to identify those who can influence a campaign's success	9.1	Identify those with a stake in a campaign, their motivations and their interests			
		9.2	Describe the support and expertise available within and outside the organisation			
		9.3	Describe additional campaign roles that may be fulfilled by people outside the organisation			
		9.4	Describe how to obtain the required support and expertise required for a campaign			
		9.5	Describe methods of championing that will positively influence others			

Learner name:	_____	Date:	_____
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Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 13: Mobilise a campaign team

Unit reference number: Y/503/2312

QCF level: 3

Credit value: 4

Guided learning hours: 16

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand what a campaign is seeking to achieve	1.1	Explain a campaign vision and strategy			
		1.2	Describe a campaign work plan			
		1.3	Describe the financial and non-financial resources needed for a campaign			
2	Establish a campaign team	2.1	Identify the people requirements of a campaign			
		2.2	Propose a campaign team to appropriate colleagues based on the skills and knowledge needed to deliver a campaign			
		2.3	Involve volunteers, beneficiaries and other supporters in a campaign team, as appropriate			
3	Develop a campaign team	3.1	Brief a team on a campaign vision and strategy			
		3.2	Identify training and information needs of the team			
		3.3	Provide any necessary information to the wider campaign supporter base			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to build a campaign team	4.1	Explain the methods and techniques for selecting and involving a campaign team			
		4.2	Give examples of best practice in relation to working in a team to achieve set objectives			
		4.3	Give examples of information that a campaign team needs in order to deliver a campaign			
		4.4	Explain methods of supporting a campaign team			
		4.5	Describe the different needs of paid and unpaid members of a team			
		4.6	Outline the organisation's obligations towards a campaign team			
		4.7	Describe the training needs of a campaign team and supporter base			
		4.8	Describe ways of analysing own performance in mobilising a team			
		4.9	Give examples of methods of involving and motivating campaigners			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Support a campaign team	5.1	Build positive relationships with and among a campaign team			
		5.2	Collect suggestions from the team in the decision-making process			
		5.3	Propose actions to appropriate colleagues and share responsibility for decisions with the campaign team			
		5.4	Provide support to a campaign team			
		5.5	Encourage and motivate a campaign team to deliver campaign objectives			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

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(if sampled)

Unit 14: Maintain relationships integral to a campaign

Unit reference number: D/503/2313

QCF level: 3

Credit value: 4

Guided learning hours: 14

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand a campaign vision	1.1	Explain a campaign vision and strategy			
		1.2	Define the aims and objectives for a campaign			
		1.3	Describe the environment in which own organisation operates			
2	Know how to recognise potential relationship opportunities	2.1	Describe opportunities to engage with others and how to use these to own advantage			
		2.2	Outline potential allies, supporters and opponents			
		2.3	Describe the influence of allies, supporters and opponents on campaign targets			
		2.4	Describe methods and techniques for engaging with others			
		2.5	Identify the availability of other relevant people and resources when assessing required support			
		2.6	Give examples of networking opportunities			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Create opportunities for relationship building	3.1	Identify opportunities to engage with others with the aim of winning their support			
		3.2	Identify and prioritise potential campaign allies, supporters and opponents			
		3.3	Proactively seek the involvement of others			
		3.4	Secure commitment from external supporters to aid the delivery of a campaign			
		3.5	Secure commitment from stakeholders to aid the delivery of a campaign			
		3.6	Assess the level and extent of power of potential campaign allies, supporters and opponents			
		3.7	Ensure own actions and behaviour when dealing with others encourage openness, fairness and cooperation			
4	Understand how existing relationships support a campaign	4.1	Explain the importance of maintaining productive working relationships			
		4.2	Explain why it is important to maintain relationships with beneficiaries and supporters when a campaign ends			
		4.3	Explain the importance of involving beneficiaries in a campaign			
		4.4	Describe ways in which beneficiaries are involved in campaigns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Know how to maintain existing relationships	5.1	Map out beneficiaries and support groups for a campaign			
		5.2	Identify the needs and characteristics of beneficiaries and support groups			
		5.3	Explain how to deal with grievances and manage conflicts of interest			
6	Maintain stakeholders interest in a campaign	6.1	Network with stakeholders to maintain their loyalty and interest in a campaign			
		6.2	Draw on the expertise of stakeholders in delivering a campaign			
		6.3	Develop an update plan to feed back to stakeholders on campaign performance			
		6.4	Regularly inform stakeholders of campaign progress, events and outputs			

Learner name: _____ Date: _____
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(if sampled)

Unit 15: Coordinate materials and products for a campaign

Unit reference number: K/503/2315

QCF level: 3

Credit value: 4

Guided learning hours: 13

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the identity of a campaign	1.1	Explain a campaign strategy			
		1.2	Describe the aims and objectives of a campaign			
		1.3	Give examples of key events in a campaign calendar			
		1.4	Describe the identity or brand of a campaign			
2	Know the requirements for developing materials and products for a campaign	2.1	Describe own role in the production and development process			
		2.2	Describe the intended audience for materials and products			
		2.3	Explain the purpose of the materials and products to be developed			
		2.4	Explain the budget available for materials and products			
		2.5	Explain the relative merits of a range of online and offline campaigning tools			
		2.6	Describe the factors to take into consideration when selecting materials and products for a campaign			
		2.7	Describe the resources required to develop materials and products for a campaign			
		2.8	Explain the capacity of the organisation to develop and produce materials and products			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Confirm the materials and products to be used for a campaign	3.1	Identify the range of different materials and products available within a campaign budget			
		3.2	Describe the information and access needs of an audience/s to ensure complete inclusivity			
		3.3	Assess materials and products for compliance with relevant legislation			
		3.4	Assess the suitability and impact of the different materials and products to campaign audience/s			
		3.5	Describe the materials and products that are likely to engage a campaign's intended audience			
		3.6	Select materials and products based on an assessment of their suitability and cost effectiveness to a campaign and its audience/s			
4	Coordinate the design and production of materials and products	4.1	Create a brief for the materials and products required			
		4.2	Monitor the development of materials and products			
		4.3	Make materials and products available to a campaign when required			
		4.4	Use materials and products in accordance with a campaign strategy and work plan			

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<i>(if sampled)</i>			

Unit 16: Ensure your own actions reduce risks to health and safety

Unit reference number: K/502/7986

QCF level: 3

Credit value: 2

Guided learning hours: 6

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand legal and organisational requirements in relation to health and safety	1.1	Describe the key features of the legislation, policies, procedures, codes of practice and guidelines in relation to duties for health and safety in the workplace			
		1.2	Explain the reasons why it is important to take action to reduce risks to health and safety in accordance with relevant legal and organisational requirements			
		1.3	Identify the risks to health and safety that may arise in the workplace, and describe the actions required to deal with them			
		1.4	Identify the 'responsible persons' to whom health and safety matters should be reported			
		1.5	Explain the importance of personal conduct and personal presentation in maintaining own health and safety and that of others			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify hazards and evaluate risks in the workplace	2.1	Identify aspects of the workplace and working practices which pose potential risks to self and others			
		2.2	Evaluate potentially harmful working practices identifying those which present the highest risk to self or others			
		2.3	Report high risk hazards to the 'responsible person'			
3	Be able to reduce risks to health and safety in the workplace	3.1	Take action to deal with health and safety issues			
		3.2	Make suggestions for reducing risks to health and safety to the 'responsible persons'			

Learner name: _____

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Unit 17: Speaking and listening skills**Unit reference number:** Y/503/3377**QCF level:** 2**Credit value:** 3**Guided learning hours:** 24

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to communicate with others	1.1	Use language and tone to respond to a range of situations			
		1.2	Illustrate actual and potential barriers to effective speaking and listening			
		1.3	Use strategies to overcome barriers to effective speaking and listening			
2	Be able to present information to others	2.1	Select features of effective communication			
		2.2	Present information in a logical manner			
		2.3	Present ideas in a logical manner			
		2.4	Speak clearly and coherently using appropriate pace and volume			
3	Be able to obtain information from others	3.1	Encourage others in a group to speak			
		3.2	Create opportunities for listeners to clarify or question information presented			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to engage in discussion	4.1	Demonstrate the ability to create relevant contributions and help to move discussion forward			
		4.2	Assess the need to adapt contributions to discussions to suit audience, context, purpose and situation			
		4.3	Use a range of phrases for interruption and change of topic			
		4.4	Select evidence to support opinions and arguments			
		4.5	Respond to criticism and criticise constructively			

Learner name: _____

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(if sampled)

Unit 18: Team working**Unit reference number:** A/501/5163**QCF level:** 3**Credit value:** 3**Guided learning hours:** 23

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to plan collaborative work with others	1.1	Describe the skills needed to work well in a team			
		1.2	Agree objectives for working together and identify what needs to be done to achieve them			
		1.3	Share relevant information to help agree roles and responsibilities			
		1.4	Agree suitable working arrangements with other team members			
2	Be able to develop and maintain co-operative ways of working to achieve agreed objectives	2.1	Organise and complete own tasks to agreed standards and timescales			
		2.2	Seek ways to work co-operatively, such as ways to resolve conflict and ways to maintain open communication			
		2.3	Share accurate information on progress and agree changes where necessary to achieve objectives			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to review work with others and agree ways of improving collaborative work in the future	3.1	Provide a detailed account of what went well and less well from own point of view			
		3.2	Identify factors influencing the outcome of working with others, including own role			
		3.3	Explain how improved interpersonal skills could contribute to the effectiveness of group/teamwork in the future			

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(if sampled)

Unit 19: Budgeting for the business

Unit reference number: M/501/3927

QCF level: 3

Credit value: 3

Guided learning hours: 12

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the relevance of budgets and the importance of operating within them	1.1	Explain the relevance of budgets and the importance of operating within them			
2	Be able to construct and manage a budget	2.1	Gather information and construct a simple budget for the business			
		2.2	Explain how to monitor the budget in order to control and enhance business performance			

Learner name: _____

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Learner signature: _____

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Internal verifier signature: _____
(if sampled)

Date: _____

Unit 20: Set objectives and provide support for team members

Unit reference number: M/600/9600

QCF level: 3

Credit value: 5

Guided learning hours: 35

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to communicate a team's purpose and objectives to the team members	1.1	Describe the purpose of a team			
		1.2	Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)			
		1.3	Communicate the team's purpose and objectives to its members			
2	Be able to develop a plan with team members showing how team objectives will be met	2.1	Discuss with team members how team objectives will be met			
		2.2	Ensure team members participate in the planning process and think creatively			
		2.3	Develop plans to meet team objectives			
		2.4	Set SMART personal work objectives with team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to support team members identifying opportunities and providing support	3.1	Identify opportunities and difficulties faced by team members			
		3.2	Discuss identified opportunities and difficulties with team members			
		3.3	Provide advice and support to team members to overcome identified difficulties and challenges			
		3.4	Provide advice and support to team members to make the most of identified opportunities			
4	Be able to monitor and evaluate progress and recognise individual and team achievement	4.1	Monitor and evaluate individual and team activities and progress			
		4.2	Provide recognition when individual and team objectives have been achieved			

Learner name: _____ Date: _____
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 (if sampled)

Unit 21: Support team members in identifying, developing and implementing new ideas

Unit reference number: L/600/9636

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to develop team ideas and develop the creativity of team members	1.1	Encourage team members to identify ideas			
		1.2	Record team members' ideas			
2	Be able to assess the viability of team members' ideas	2.1	Assess with team members the potential benefits and risks associated with an idea, and the resources required			
3	Be able to support team members to implement ideas	3.1	Explain how to support team members in submitting formal proposals for approval			
		3.2	Explain to team members how to identify and overcome barriers to implementing an idea			
4	Be able to implement team ideas	4.1	Monitor the implementation of ideas by own team			
		4.2	Communicate the progress of implementation to relevant others own organisation			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Guided learning hours: 10

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify circumstances that require a decision to be made	1.1	Explain the circumstances requiring a decision to be made			
		1.2	State the desired objective(s) for making a decision			
		1.3	Establish criteria on which to base the decision, in line with own organisation			
2	Be able to collect information to inform decision-making	2.1	Identify information needed to inform the decision-making process			
		2.2	Communicate with stakeholders affected by the decision			
		2.3	Explain how to inform stakeholders about the decision-making process			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to analyse information to inform decision making	3.1	Identify information for validity and relevance to the decision-making process			
		3.2	Analyse information and against established criteria			
4	Be able to make a decision	4.1	Apply decision-making technique(s) to determine a decision			
		4.2	Explain the decision made in line with desired objectives			
		4.3	Communicate the decision taken to relevant stakeholders			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 23: Manage the work of volunteers**Unit reference number:** D/502/1599**QCF level:** 3**Credit value:** 6**Guided learning hours:** 39

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to plan the work of volunteers	1.1	Give opportunities to volunteers to contribute to the planning and organisation of their work			
		1.2	Produce plans that take into account the relevant factors of volunteering including: (i) your team's objectives (ii) the volunteers whose work you are responsible for and their development needs (iii) constraints under which volunteers may be working (iv) meeting the motivational needs of your volunteers			
		1.3	Produce plans and schedules that are realistic and achievable within organisational constraints			
		1.4	Explain the plans to others clearly and in sufficient detail to gain support, motivation and commitment			
		1.5	Update plans at regular intervals and take account of any changes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to prepare resources for volunteers	2.1	Check that resources are available and suitable for the planned work and take the appropriate action where there are any problems			
		2.2	Allocate resources so that volunteers can do the work to the required standard			
		2.3	Make sure volunteers are using resources according to organisational, legal and regulatory requirements			
		2.4	Make sure volunteers are using resources efficiently and effectively and encourage them to suggest improvements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to lead the work of volunteers	3.1	Make volunteers feel welcome and introduce any new volunteers to each other and the rest of the team			
		3.2	Clearly explain organisational policy in relation to: (i) volunteering (ii) confidentiality (iii) welfare (iv) health and safety (v) volunteer insurance (vi) training and developing volunteers (vii) equal opportunities			
		3.3	Provide volunteers with clear instructions on tasks they have to do in line with organisational and legal requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	3.4	Correctly demonstrate the tasks and check that volunteers understand what is expected				
	3.5	Let the volunteers practise the tasks under competent supervision until they can consistently achieve the required standard on their own				
	3.6	Identify and correct any mistakes in a way that supports their self-confidence and praise them when they perform tasks correctly				
	3.7	Identify volunteers who could take on new responsibilities and agree what development would be appropriate to their needs				
	3.8	Identify volunteer work that does not meet agreed standards and take the appropriate action				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to assess the work of volunteers and provide feedback	4.1	Explain the purpose of assessment clearly to all involved			
		4.2	Give opportunities to volunteers to assess their own work			
		4.3	Carry out assessments at times most likely to maintain and improve effective performance			
		4.4	Make your assessments objectively against clear and agreed criteria			
		4.5	Provide feedback to volunteers in a situation and manner most likely to maintain and improve motivation.			
		4.6	Provide feedback which recognises team members achievements and provide constructive suggestions and encouragement for improving their work			
		4.7	Show respect for the individuals involved and treat all feedback to individuals and teams confidentially			
		4.8	Give opportunities to team members to respond to feedback			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to promote health and safety and environmental good practice	5.1	Work in a way which promotes health and safety, is consistent with relevant legislation, codes of practice and any additional requirements			
6	Be able to maintain accurate records	6.1	Provide clear and accurate information for recording purposes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Understand how to plan the work of volunteers	7.1	Explain how to provide volunteers with the opportunity to contribute to the planning and organisation of their work			
		7.2	Describe how to produce plans that take into account the relevant factors of volunteering including: (i) your team's objectives (ii) the volunteers whose work you are responsible for and their development needs (iii) constraints under which volunteers may be working (iv) meeting the motivational needs of your volunteers			
		7.3	Explain how to develop realistic and achievable work plans both in the short and medium term			
		7.4	Describe how to present work plans in a way that gains support, motivation and commitment			
		7.5	Explain the need to regularly review work plans			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
8	Understand how to prepare resources for volunteers	8.1	Explain how to check that the appropriate resources are available and outline the procedures to follow for obtaining resources			
		8.2	Outline the procedure for reporting problems with resources			
		8.3	Summarise organisational, legal and regulatory standards for the resources that the work uses			
		8.4	Explain how to allocate resources in a way that enables the achievement of objectives			
		8.5	Explain the need to ensure resources are used efficiently and effectively and the implications for not doing so			
		8.6	Explain the impact that the use of resources could have on the environment			
		8.7	Explain the reasons for getting others to suggest ways of improving the use of resources			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
9	Understand how to lead the work of volunteers	9.1	Describe the induction process for new volunteers and the importance of making volunteers feel welcome and part of the team			
		9.2	Describe how to ensure that new volunteers understand organisational policy in relation to: (i) volunteering (ii) confidentiality (iii) welfare (iv) health and safety (v) volunteer insurance (vi) training and developing volunteers (vii) equal opportunities			
		9.3	Describe how to instruct volunteers and to demonstrate tasks clearly and correctly to ensure that volunteers understand what they have to do			
		9.4	Explain the reasons for making sure volunteers continue to be supervised until they can achieve the standard required and the action to take when work does not meet the standard			
		9.5	Describe how to correct mistakes without undermining self-confidence			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	9.6	Explain how to recognising the potential for volunteers to take on new responsibilities and outline the development opportunities available to them				
	9.7	Outline the organisational and legal requirements that are relevant to the tasks the volunteers are being developed to undertake				
	9.8	Describe how organisations gives recognition and reward to volunteers				
	9.9	Explain methods of handling difficulties with volunteer work, and procedures for dealing with problems				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
10	Understand how to assess the work of volunteers and provide feedback	10.1	Explain the need to communicate clearly the purpose of assessment to all involved			
		10.2	Explain the reasons for providing opportunities to volunteers to assess their own work			
		10.3	Explain the principles of fair and objective assessment of work and how to ensure this is achieved			
		10.4	Explain how to provide feedback to volunteers on their performance based on assessment			
		10.5	Explain the principles of respect and confidentiality when providing feedback			
		10.6	Describe how to motivate volunteers and gain their commitment by providing feedback			
		10.7	Explain how to provide constructive suggestions on how performance can be improved			
		10.8	Describe how to give those involved the opportunity to respond to feedback and provide suggestions on how to improve their work			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
11	Understand relevant health and safety legislation and environmental good practice	11.1	Summarise current health and safety legislation, codes of practice and any additional requirements			
12	Understand the importance of accurate record keeping	12.1	Explain the records required for management and legislative purposes and the importance of maintaining them			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 24: Contribute to good working relationships

Unit reference number: R/600/9010

QCF level: 2

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to communicate effectively with colleagues	1.1	Explain the importance of balancing the needs of tasks and people			
		1.2	Explain the importance of sharing information with colleagues			
		1.3	Identify ways of tactfully requesting others to change working arrangements to improve own productivity			
		1.4	Describe how to resolve conflict situations or dissatisfaction			
		1.5	Explain the importance of liaison with colleagues to productivity			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop and maintain good working relationships during the production process	2.1	Identify key roles and tasks in the production process			
		2.2	Clarify, agree and revise working arrangements, promoting good working relationships			
		2.3	Communicate own decisions clearly and constructively			
		2.4	Resolve any conflict situations or dissatisfaction as necessary			
		2.5	Liaise with appropriate colleagues to ensure effective and productive working			

Learner name: _____ Date: _____
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 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 25: Planning and reviewing learning**Unit reference number:** T/501/5162**QCF level:** 3**Credit value:** 3**Guided learning hours:** 23

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to set targets using information from appropriate people	1.1	Seek information on ways to achieve what they want to do			
		1.2	Identify factors that might affect their plans			
		1.3	Use this information to set realistic targets			
2	Be able to plan how targets will be met	2.1	Identify clear action points			
		2.2	Plan how to: a) manage time b) use support c) review progress d) overcome possible difficulties			
		2.3	Explain how constructive feedback and reflection can help to improve learning			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to take responsibility for own development using their plan to help meet targets and improve performance	3.1	Describe strategies for effective time management			
		3.2	Manage time to meet deadlines, revising plan as necessary			
		3.3	Choose appropriate ways to improve their performance, adapting approaches to meet new demands			
		3.4	Reflect on progress, seeking feedback and support to help meet targets			
4	Be able to review progress and evidence of achievements and agree ways to improve	4.1	Review approaches to the learning undertaken and identify factors affecting the quality of learning			
		4.2	Describe targets met and evidence of achievements			
		4.3	Consult appropriate people and agree ways to further improve own performance			

Learner name: _____

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(if sampled)

Date: _____

Unit 26: Plan and organise an event**Unit reference number:** R/601/2540**QCF level:** 3**Credit value:** 4**Guided learning hours:** 28

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the role of an event organiser in planning an event	1.1	Explain the purpose and benefits of planning an event			
		1.2	Explain the role of the event organiser in: i) meeting the objectives of the event ii) agreeing a brief and budget for the event			
		1.3	Identify and evaluate the types of risks associated with events and explain how to minimise these			
		1.4	Explain the purpose and benefits of a contingency plan for an event			
		1.5	Describe the types of problems that may occur when organising an event and how to solve them			
		1.6	Categorise different types of events and their main features			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand the arrangements to be made when planning and organising an event	2.1 Explain the role of the event organiser for i) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements ii) meeting relevant health, safety and security arrangements iii) meeting legal and organisational requirements for contracts iv) organising resources and the production of event materials v) the types of activities and resources that may be needed during an event vi) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the different types of venues and resources needed for different types of events	3.1	Identify and evaluate different types of venue in terms of suitability for events and costs			
		3.2	Describe a range of resources that may be needed for events and illustrate how they may be used			
		3.3	Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to plan and organise an event	4.1	Agree an event brief and budget			
		4.2	Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies			
		4.3	Identify and agree resources and support needed for organising an event			
		4.4	Agree requirements for venue(s)			
		4.5	Identify venue and agree costings			
		4.6	Liaise with the venue to confirm event requirements and/or any special delegate requirements			
		4.7	Agree requirements for resources			
		4.8	Co-ordinate resources and production of event materials			
		4.9	Make sure arrangements are in place for the event to meet relevant health, safety and security requirements			
		4.10	Make sure legal and organisational requirements for contracts are met			
		4.11	Make sure that all those involved are briefed and trained to fulfil their roles			
		4.12	Delegate functions to the event team as required			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	4.13	Make arrangements for rehearsals to make sure the event runs smoothly, if required				
	4.14	Make sure invitations are sent out to delegates				
	4.15	Manage delegate responses				
	4.16	Prepare joining instructions and event materials to be sent to delegates				

Learner name: _____

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Learner signature: _____

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(if sampled)

Date: _____

Unit 27: Develop a presentation**Unit reference number:** M/601/2528**QCF level:** 3**Credit value:** 3**Guided learning hours:** 15

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of preparing for and evaluating a presentation	1.1	Explain the purpose of using different types of presentation and equipment to provide information			
		1.2	Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies			
		1.3	Explain the benefits of preparing for giving a presentation			
		1.4	Explain and illustrate how presentations may be enhanced by materials and equipment			
		1.5	Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop a presentation	2.1	Agree and confirm audience, purpose, content, style and timing of a presentation			
		2.2	Research and plan a presentation			
		2.3	Select any equipment needed for the presentation			
		2.4	Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience			
		2.5	Obtain feedback on planned presentation and make adjustments, if required			
		2.6	Produce presentation handouts			
		2.7	Collect feedback on the written presentation			
		2.8	Reflect on the feedback obtained of the written presentation and identify learning points			
		2.9	Identify changes that will improve future written presentations			

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(if sampled)

Date: _____

Unit 28: Build, support and manage a team**Unit reference number:** F/600/9682**QCF level:** 4**Credit value:** 4**Guided learning hours:** 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose and required attributes of a team and select those that match the team's requirements	1.1	Explain the role of a team in the achievement of a specific project or activity			
		1.2	Identify the attributes needed within the team to achieve its objectives			
		1.3	Analyse the skills and knowledge of potential and current team members against the identified needs			
		1.4	Identify individuals whose attributes most closely match the identified requirements			
2	Be able to induct team members and communicate their roles and responsibilities	2.1	Communicate project aims and objectives to team members			
		2.2	Explain how to introduce team members to each other and discuss each member's role and responsibilities			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to support team development	3.1	Identify the stages of team development			
		3.2	Explain how to resolve conflict between team members			
		3.3	Describe methods of encouraging team members to share knowledge and skills to achieve project objectives			
		3.4	Explain how to encourage open communication, trust and respect between team members			
4	Be able to manage team performance and understand how to disband a team	4.1	Monitor and review the performance of a team against its purpose			
		4.2	Communicate project developments and to team members and support any change in roles or responsibilities			
		4.3	Communicate team and individual successes to the all team members			
5	Understand how to disband team	5.1	Explain how to prepare team members for project conclusion			
		5.2	Describe how team is disbanded			

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Unit 29: Negotiation and influencing**Unit reference number:** H/502/0129**QCF level:** 3**Credit value:** 6**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the aims and principles of effective negotiation and influencing skills	1.1	Assess the factors that influence negotiations			
		1.2	Explain and illustrate stages in the negotiation process			
		1.3	Explain and illustrate the importance of establishing a win:win situation and how it is more effective than other negotiating positions (win:lose, lose:lose, lose:win)			
2	Know a variety of negotiation and influencing techniques and when they should be used	2.1	Evaluate variety of influencing and negotiating techniques and explain when they might be used			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to demonstrate effective negotiation and influencing skills based on reflective practice.	3.1	Establish an effective method of recording each stage of a negotiation.			
		3.2	Plan and record negotiations over a period of at least a month, describing and justifying approaches and outcomes.			
		3.3	Evaluate to what extent a win:win situation has been achieved following each negotiation.			
		3.4	Work with colleagues, where relevant, to assess how approaches and outcomes have evolved based on experience, and develop and action plan to improve practice.			

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(if sampled)

Unit 30: Manage customer service in own area of responsibility**Unit reference number:** D/600/9804**QCF level:** 3**Credit value:** 4**Guided learning hours:** 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to establish and communicate measurable customer service standards for own area of responsibility	1.1	State organisational, legal and regulatory requirements for customer service standards			
		1.2	Explain expected standards for customer service performance to employees in own area of responsibility			
		1.3	Describe measurement criteria to monitor customer service performance			
2	Be able to support staff in meeting customer service standards	2.1	Identify staff and other resources to meet customer service standards			
		2.2	Communicate roles and responsibilities to employees and provide support			
		2.3	Describe how to resolve customer service queries within own organisation's policy			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor and evaluate customer service performance, systems and processes	3.1	Monitor customer service performance against established criteria			
		3.2	Analyse feedback from staff and customers on the quality of customer service			
		3.3	Evaluate customer feedback and identify areas for improvement			
		3.4	Recommend changes to customer service processes or standards based on performance evaluation			

Learner name: _____

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(if sampled)

Date: _____

Unit 31: Project management**Unit reference number:** Y/501/5168**QCF level:** 3**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of project management	1.1	Explain the difference between routine work and taking part in a project			
		1.2	Explain why it is important to agree the purpose, scope, timescale, resource requirements, budget, aims and objectives of a project			
		1.3	Describe how to identify project issues and risks			
		1.4	Describe how to plan projects using appropriate techniques			
		1.5	Describe suitable methods for monitoring progress towards outcomes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to produce a project plan to achieve specified aims and outcomes	2.1	Establish the project's scope and its contribution to the wider objectives of the organisation			
		2.2	Set project aims and project outcomes and identify measures by which the outcomes will be judged			
		2.3	Estimate costs and timeframe			
		2.4	Identify suitable methods for monitoring progress towards outcomes			
		2.5	Draft a plan for the given project using appropriate techniques			
		2.6	Use feedback from appropriate people and agree final plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement the project plan	3.1	Agree roles and responsibilities of self and others contributing to the project			
		3.2	Carry out own responsibilities to quality standards			
		3.3	Adapt activities to changing requirements			
		3.4	Communicate with team members, and exchange information, in ways that help to meet project objectives			
		3.5	Monitor and record progress, and amend plan as needed			
4	Be able to evaluate the success of the project	4.1	Use appropriate methods to evaluate the project			
		4.2	Report on the extent to which the outcomes of the project were achieved			
		4.3	Describe the costs and benefits resulting from completion of the project			

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(if sampled)			

Unit 32: Working in administration**Unit reference number:** A/505/7011**QCF level:** 2**Credit value:** 6**Guided learning hours:** 60

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know the role of an administrator within business and administration	1.1	Describe the role of administrator within business and administration			
		1.2	Describe how the role of administrator relates to others within the business organisation			
2	Understand legislation affecting the work of administrators within a business environment	2.1	Explain the importance of legislation affecting the work of the administrator within a business environment			
		2.2	Explain how data protection legislation could affect the work of an administrator			
3	Understand health and safety issues that affect the work of administrators within a business environment	3.1	Explain how health and safety issues could affect the work of administrators within a business environment			
4	Understand the importance of organising their work area within a business environment	4.1	Explain the importance of organising the work area within a business environment			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to carry out administrative processes in a business environment	5.1	Use office equipment to complete administrative tasks according to organisational procedures			
		5.2	File business documents in accordance with organisational procedures			
		5.3	Handle mail to comply with the requirements of a business environment including • Incoming mail • Outgoing mail			
6	Be able to reflect on own performance when carrying out administrative tasks in a business environment	6.1	Identify own strengths and weakness in carrying out administrative tasks in a business environment			
		6.2	Identify ways to improve own performance when carrying out administrative tasks in a business environment			

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 (if sampled)

Unit 33: Introduction to fundraising**Unit reference number:** T/503/1538**QCF level:** 2**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising activities	1.1	Define different forms and methods of fundraising			
		1.2	Describe the role and purpose of fundraising within an organisation			
		1.3	Describe the key elements of a case for support			
		1.4	Explain the purpose of donor research and its importance to building a case for support			
		1.5	Explain the importance of targeting appropriate support			
		1.6	Describe processes for asking for support			
		1.7	Explain the importance of understanding the motives supporters may have for offering support			
		1.8	Explain the importance of developing a clear and comprehensive fundraising plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand fundraising information and regulation	2.1	Describe sources of information to help with fundraising			
		2.2	Describe key fundraising codes of practice			
		2.3	Describe the importance of data protection and confidentiality in fundraising			
		2.4	Describe the work of the Fundraising Standards Board			
		2.5	Describe tax effective fundraising			
3	Understand funding sources and fundraising resources, income sources and budgets	3.1	Describe different sources of funding			
		3.2	Describe the types of resources used in different forms of fundraising			
		3.3	Explain the importance of working to a budget in fundraising			
		3.4	Explain the importance of measuring the return on investment			
		3.5	Explain the importance of recording information resulting from the fundraising approach			
		3.6	Explain the importance of maintaining supporter databases			

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Unit 34: Introduction to managing volunteers

Unit reference number: T/503/2320

QCF level: 2

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand managing volunteers	1.1	Outline the role of managing volunteers			
		1.2	Define the key responsibilities involved in managing volunteers			
		1.3	Describe the benefits of volunteering to the organisation, volunteers and clients			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand policies and procedures relating to the management of volunteers	2.1	Describe the legal status of volunteers and their distinctiveness from and relationship to paid staff			
		2.2	Describe legal and policy issues relevant to managing volunteers			
		2.3	Explain the importance of having good practice policies and procedures relating to the management of volunteers			
		2.4	Outline the key elements of a good practice volunteer policy			
		2.5	Explain the importance of risk assessments and risk management when managing volunteers			
		2.6	Explain the importance of health and safety monitoring when managing volunteers			
		2.7	Outline statutory health and safety requirements relating to volunteers			
		2.8	Explain the importance of equality, diversity and inclusion			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the management of volunteers	3.1	Explain the importance of promoting volunteering within an organisation and to potential and actual volunteers			
		3.2	Describe processes for recruiting, inducting, retaining and recognising volunteers			
		3.3	Describe the importance of managing own work, responsibilities and relationships			
		3.4	Outline techniques for leading, motivating, supervising, supporting and developing volunteers			
		3.5	Describe techniques for managing and communicating with volunteers			
		3.6	Describe the importance of tailoring own management style and communication techniques to individual volunteers			
		3.7	Describe techniques for assessing volunteers' performance			
		3.8	Explain the importance of providing feedback to volunteers			
		3.9	Describe ways that management techniques can improve volunteers' performance			

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<i>(if sampled)</i>			

Pearson BTEC Level 3 Diploma in Fundraising Practice (QCF)

Mandatory units

Unit reference number: A/E03/1E30

OCE level: 3

Credit value: 6

Guided learning hours: 6

This unit is assessed in the workplace or in conditions resembling the

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to prepare to develop a fundraising plan	1.1	Confirm responsibilities and targets for fundraising			
		1.2	Establish timescales and objectives for fundraising			
		1.3	Identify resources required for fundraising			
		1.4	Research recent local performance in a specific form of fundraising			
		1.5	Research possible local donors in a specific form of fundraising			
		1.6	Refer to the Institute of Fundraising's codes of practice when preparing the plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop a fundraising plan with colleagues and other stakeholders	2.1	Agree fundraising priorities with colleagues and stakeholders			
		2.2	Identify internal and external sources for networking			
		2.3	Co-ordinate work with colleagues to avoid duplication			
		2.4	Identify appropriate fundraising opportunities and potential supporters with colleagues and stakeholders			
		2.5	Consult with colleagues and stakeholders to confirm a case for support			
		2.6	Articulate a case for support to the relevant colleagues and stakeholders			
		2.7	Select and justify techniques and approaches to be used during fundraising activities			
		2.8	Identify appropriate ways to communicate and ask for support			
		2.9	Agree a fundraising plan with colleagues and stakeholders			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to test a fundraising plan	3.1	Ensure a plan meets relevant policies and practices			
		3.2	Agree with relevant colleagues and stakeholders that a plan is achievable with the resources available for implementation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 2: Implement a plan for fundraising activities

Unit reference number: M/503/1540

QCF level: 3

Credit value: 3

Guided learning hours: 6

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to prepare to implement a fundraising plan	1.1	Refine a fundraising plan according to test findings			
		1.2	Communicate donor information to the relevant colleagues			
		1.3	Identify appropriate targets for the plan			
2	Be able to implement a fundraising plan	2.1	Carry out a plan according to scheduled timescales			
		2.2	Gain support from donors using appropriate asking techniques			
		2.3	Maintain systems for managing a plan			
		2.4	Use systems and processes to respond to fundraising queries			
		2.5	Liaise with colleagues and stakeholders to maximise fundraising benefits			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor the implementation of a fundraising plan	3.1	Assess the performance of a plan against identified targets			
		3.2	Review the budgets and resources used against a fundraising plan			
		3.3	Confirm the targets met with colleagues and stakeholders			
		3.4	Prepare update reports on the implementation of a fundraising plan			
		3.5	Maintain up-to-date records, databases, communications and contacts			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Maintain and enhance relationships with supporters of your cause

Unit reference number: T/503/1541

QCF level: 3

Credit value: 6

Guided learning hours: 6

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand supporters of a cause	1.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		1.2	Describe the types of supporters of a fundraising organisation			
		1.3	Explain how to identify trends in the types and levels of support			
		1.4	Explain reasons why people support a specific fundraising organisation			
		1.5	Summarise the most effective ways of maintaining records on supporters			
		1.6	Describe the methods used to maintain existing support			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to maintain existing levels of support	2.1	Identify the information required to inform supporter strategies			
		2.2	Use systems for holding supporter information			
		2.3	Maintain supporter records in accordance with legislation, regulations, codes of practice and organisational requirements			
		2.4	Analyse trends in the types and level of support received			
		2.5	Suggest new or alternative methods of maintaining existing support			
		2.6	Communicate with existing supporters in ways that promote commitment and positive relations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to maintain and develop support	3.1	Explain the importance of a clear and comprehensive supporter development plan			
		3.2	Explain the impact of legislation, regulations and codes of practice on supporter development			
		3.3	Explain where to find information on relevant legislation, regulations and codes of practice			
		3.4	Describe common motives for individual giving behaviour and long-term support			
		3.5	Evaluate different types of communication channels for liaising with supporters			
		3.6	Explain the importance of profiling, segmentation, testing and targeting			
		3.7	Explain how to deal with requests for support			
		3.8	Explain the importance of identifying performance benchmarks for maintaining and developing support			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to maintain and develop support	4.1	Develop opportunities for gathering support			
		4.2	Describe techniques to maintain supporter interest			
		4.3	Enable supporters to comment on the frequency of contact with the fundraising organisation			
		4.4	Manage requests for support including supporters upgrading their giving			
		4.5	Assess the value of different types of supporter			
		4.6	Identify where supporter satisfaction could be improved			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Budgeting for the business**Unit reference number:** M/501/3927**QCF level:** 3**Credit value:** 3**Guided learning hours:** 12

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the relevance of budgets and the importance of operating within them	1.1	Explain the relevance of budgets and the importance of operating within them			
2	Be able to construct and manage a budget	2.1	Gather information and construct a simple budget for the business			
		2.2	Explain how to monitor the budget in order to control and enhance business performance			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 5: Introduction to fundraising**Unit reference number:** T/503/1538**QCF level:** 2**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising activities	1.1	Define different forms and methods of fundraising			
		1.2	Describe the role and purpose of fundraising within an organisation			
		1.3	Describe the key elements of a case for support			
		1.4	Explain the purpose of donor research and its importance to building a case for support			
		1.5	Explain the importance of targeting appropriate support			
		1.6	Describe processes for asking for support			
		1.7	Explain the importance of understanding the motives supporters may have for offering support			
		1.8	Explain the importance of developing a clear and comprehensive fundraising plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand fundraising information and regulation	2.1	Describe sources of information to help with fundraising			
		2.2	Describe key fundraising codes of practice			
		2.3	Describe the importance of data protection and confidentiality in fundraising			
		2.4	Describe the work of the Fundraising Standards Board			
		2.5	Describe tax effective fundraising			
3	Understand funding sources and fundraising resources, income sources and budgets	3.1	Describe different sources of funding			
		3.2	Describe the types of resources used in different forms of fundraising			
		3.3	Explain the importance of working to a budget in fundraising			
		3.4	Explain the importance of measuring the return on investment			
		3.5	Explain the importance of recording information resulting from the fundraising approach			
		3.6	Explain the importance of maintaining supporter databases			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 6: Understand the nature and governance of the voluntary sector

Unit reference number: F/503/2322

QCF level: 3

Credit value: 4

Guided learning hours: 37

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the structure of the voluntary sector	1.1	Explain the differences between the voluntary sector and the public and private sectors			
		1.2	Summarise the voluntary sector's contribution to wider and civil society			
		1.3	Summarise the types and structures of voluntary sector organisations			
2	Understand the policies and legislation that govern the sector	2.1	Explain how a specific voluntary sector organisation is held to account			
		2.2	Summarise policies and legislation currently affecting the voluntary sector			
		2.3	Explain how charity and employment law relate to the sector and a specific voluntary sector organisation			
		2.4	Explain how a specific organisation's mission, ethics and values are shaped or influenced by policies and legislation			
		2.5	Describe the risks faced by voluntary sector organisations when policies and legislation are not adhered to			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the governance of voluntary sector organisations	3.1	Describe the structure of a specific voluntary sector organisation's governing body			
		3.2	Explain why voluntary sector organisations have trustees and management committees			
		3.3	Describe the role of trustees and management committee members			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 7: Understand values, ethics and safeguarding in the voluntary sector

Unit reference number: R/503/2325

QCF level: 2

Credit value: 3

Guided learning hours: 26

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand values and ethics in the voluntary sector	1.1	Define the mission of a specific voluntary sector organisation			
		1.2	Describe the values, ethics and beliefs of a specific voluntary sector organisation			
		1.3	Describe how different organisations' values, ethics and beliefs influence their practice			
2	Understand the importance of equality, diversity and inclusion in the voluntary sector	2.1	Define equality, diversity and inclusion			
		2.2	Describe the importance of promoting equality, diversity and inclusion within the voluntary sector			
		2.3	Describe a specific voluntary sector organisation's commitment to equality and diversity			
		2.4	Describe the equality and diversity policies and legislation relevant to the voluntary sector			
		2.5	Explain why voluntary sector organisations conduct equality impact assessments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand safeguarding in the voluntary sector	3.1	Explain the importance of safeguarding in the voluntary sector			
		3.2	Describe the safeguarding policies and legislation relevant to the voluntary sector and a specific organisation			
		3.3	Describe how a specific voluntary sector organisation safeguards its service users			

Learner name: _____ Date: _____

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Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 8: **Understand effective partnership working between organisations****Unit reference number:** J/503/2323**QCF level:** 2**Credit value:** 4**Guided learning hours:** 36

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how partnership working can help an organisation achieve its mission	1.1	Summarise different types of partnership, including networks, consortia, collaborations and formal partnerships			
		1.2	Describe the benefits and risks of partnership working			
		1.3	Describe types of partners and ways partnership working may help achieve a mission			
		1.4	Describe the advantages and disadvantages of partnership working for organisations with a shared mission			
2	Understand how partnership working is governed	2.1	Describe the policies and legislation that apply to partnership working			
		2.2	Describe the legislation, codes of practice and protocols that apply to confidentiality, data protection and information sharing			
		2.3	Describe ways partner organisations share decision making			
		2.4	Explain when to seek informal and formal legal advice on partnership arrangements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to work in partnership with other organisations	3.1	Describe the principles of working with other organisations, including consortia and groups			
		3.2	Describe ways to develop positive working relationships with colleagues in other organisations			
		3.3	Describe different forms of communication and their uses, including new and interactive media			
		3.4	Explain the importance of recording communications with partner organisations			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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(if sampled)

Date: _____

Unit 9: Understand sustainability in voluntary sector organisations

Unit reference number: L/503/2324

QCF level: 3

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand an organisation's position in the voluntary sector	1.1	Describe the services provided by a specific voluntary sector organisation and the users of those services			
		1.2	Explain how a specific voluntary sector organisation's work plan relates to its mission and values			
		1.3	Analyse ways in which a specific voluntary sector organisation measures its impact			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand how to sustain a voluntary sector organisation	2.1	Describe ways in which a voluntary sector organisation can expand its activities			
		2.2	Explain how a specific voluntary sector organisation plans the use of resources, including volunteers			
		2.3	Summarise the different ways a specific voluntary sector organisation funds its activities			
		2.4	Explain the importance of enterprise when raising funds			
		2.5	Explain the importance of working within a budget			
		2.6	Explain how improving the quality of services can help sustain a voluntary sector organisation			
		2.7	Summarise the latest trends, enterprise and innovative practices in the sector			
		2.8	Explain why it is important to remain up to date with trends and developments in the sector			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the importance of environmental sustainability in voluntary sector organisations	3.1	Describe the voluntary sector's role in promoting environmentally friendly business practice			
		3.2	Describe how a specific voluntary sector organisation promotes environmental sustainability			
		3.3	Describe environmentally friendly practices which could help voluntary sector organisations sustain their business			

Learner name: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Optional units

Unit 10: **Know how to plan and implement local or community fundraising****Unit reference number:** A/503/1542**QCF level:** 3**Credit value:** 6**Guided learning hours:** 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand local or community fundraising	1.1	Summarise different forms of local or community fundraising			
		1.2	Summarise techniques involved in local or community fundraising			
		1.3	Evaluate the strengths and weaknesses of different forms of local or community fundraising			
		1.4	Explain the similarities between local or community fundraising and other fundraising disciplines			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	1.5	Describe motives supporters may have for offering support locally			
	1.6	Explain how to select the type of local or community fundraising most likely to achieve the aims and objectives of the community fundraising plan			
	1.7	List the legislation, regulations and codes of practice relevant to local or community fundraising			
	1.8	Explain the impact of legislation, regulation and codes of practice on local or community fundraising			
	1.9	Summarise the role of third party promotions in local or community fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to develop a local or community fundraising plan	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Explain roles and responsibilities involved in local or community fundraising			
		2.3	Describe the, objectives and schedule of activities for local or community fundraising			
		2.4	Describe the techniques to be used in local or community fundraising			
		2.5	Explain how to conduct donor research			
		2.6	Explain how to write a clear and comprehensive local or community fundraising plan			
		2.7	Describe the information required to write a budget			
		2.8	Explain how tax-effective giving applies to local or community fundraising			
		2.9	Summarise the different resources available to implement the fundraising plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in local or community fundraising	3.1	Summarise processes for consultation and approval of a local or community fundraising plan			
		3.2	Explain the importance of consulting with colleagues and other stakeholders on local or community fundraising plans			
		3.3	Explain how managing local connections and relationships can help fundraising activities			
		3.4	Describe appropriate techniques for asking relevant donors for support			
4	Know how to manage a local or community fundraising plan	4.1	Describe the information systems used to manage local or community fundraising			
		4.2	Explain how to keep records up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment of local or community fundraising			
		4.5	Explain how to administer different forms of local or community fundraising			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 11: Know how to plan and implement fundraising events

Unit reference number: F/503/1543

QCF level: 3

Credit value: 6

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising events	1.1	Summarise different types of fundraising events			
		1.2	Summarise techniques involved in fundraising events			
		1.3	Evaluate the strengths and weaknesses of different types of fundraising events			
		1.4	Explain the similarities between fundraising events and other fundraising disciplines			
		1.5	Explain how to select the type of event most likely to achieve the aims and objectives of the plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	1.6	Explain individual giving behaviour and motives for fundraising events				
	1.7	Explain the importance of volunteers in event based fundraising				
	1.8	List the legislation, regulations and codes of practice relevant to fundraising events				
	1.9	Explain the impact of legislation, regulation and codes of practice on fundraising events				
	1.10	Summarise the role of third party promotions in fundraising events				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan a fundraising event	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Explain roles and responsibilities involved in event based fundraising			
		2.3	Describe objectives, and schedule of activities for the fundraising event			
		2.4	Describe the type of event selected for the fundraising			
		2.5	Explain how to conduct donor research			
		2.6	Explain how to write a clear and comprehensive event plan, including marketing and promotion techniques			
		2.7	Summarise the resources available and those required from third party suppliers to implement the plan			
		2.8	Explain guidelines for working with third party suppliers			
		2.9	Explain how tax-effective giving applies to fundraising events			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		2.10	Explain risk assessment guidelines for fundraising events			
		2.11	Explain the importance of ensuring the event is accessible			
		2.12	Explain the steps involved in recording the benefit of events for event sponsors			
3	Know how to consult others in events based fundraising	3.1	Summarise processes for consultation and approval of a fundraising event plan			
		3.2	Explain organisational roles involved in consulting colleagues and other stakeholders on events based fundraising plans			
		3.3	Explain how to consult colleagues and other stakeholders effectively			
		3.4	Describe appropriate techniques for asking relevant donors for support			
4	Know how to manage a fundraising event plan	4.1	Describe the information systems used to manage fundraising events			
		4.2	Explain how to keep records up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 12: Know how to plan and support legacy fundraising

Unit reference number: J/503/1544

QCF level: 3

Credit value: 6

Guided learning hours: 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand legacy fundraising	1.1	Summarise different forms of legacy giving			
		1.2	Summarise techniques involved in legacy fundraising			
		1.3	Evaluate the strengths and weaknesses of legacy fundraising			
		1.4	Explain the similarities between legacy fundraising and other fundraising disciplines			
		1.5	Explain motives donors may have for giving			
		1.6	Describe different types of legacy donors and how fundraising organisations communicate with them			
		1.7	List the legislation, regulations and codes of practice relevant to legacy fundraising			
		1.8	Explain the impact of relevant legislation, regulations and codes of practice on legacy fundraising			
		1.9	Summarise the role of professional intermediaries in legacy fundraising			
		1.10	Explain the tax implications of legacy giving			
		1.11	Summarise the role of third party promotions in legacy fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan legacy fundraising	2.1	Explain the aims, ethics, culture, past history and the mission of a fundraising organisation			
		2.2	Explain own responsibilities in supporting senior colleagues			
		2.3	Describe the objectives and schedule of activities for legacy fundraising			
		2.4	Describe the fundraising approaches to be used in legacy fundraising			
		2.5	Explain roles involved with researching legacy fundraising donors			
		2.6	Describe the information contained in legacy fundraising plans			
3	Know how to consult others in legacy fundraising	3.1	Summarise processes for consultation and approval of a legacy fundraising plan			
		3.2	Describe organisational roles involved in consulting relevant stakeholders on legacy fundraising plans			
		3.3	Describe roles involved in sustaining and monitoring local connections and relationships			
		3.4	Describe techniques used to ask legacy donors for support			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to manage a legacy fundraising plan	4.1	Describe the information systems used to manage legacy fundraising			
		4.2	Explain how records are kept up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment			

Learner name: _____

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Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 13: Know how to plan and support corporate fundraising activity

Unit reference number: D/503/1534

QCF level: 3

Credit value: 6

Guided learning hours: 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand corporate fundraising	1.1	Summarise motives for corporate giving			
		1.2	Summarise techniques involved in corporate fundraising			
		1.3	Summarise the forms that corporate support might take			
		1.4	Evaluate the strengths and weaknesses of corporate fundraising			
		1.5	Explain the similarities between corporate fundraising and other fundraising disciplines			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	1.6	Explain who is responsible for taking decisions about support				
	1.7	Explain the benefits and risks of entering into partnerships with corporate supporters				
	1.8	Explain the tax benefits that apply to various forms of corporate giving				
	1.9	List the legislation, regulations and codes of practice relevant to corporate fundraising Explain the impact of relevant legislation, regulations and codes of practice on corporate fundraising plans				
	1.10	Summarise the role of third party promotions in corporate fundraising				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan corporate fundraising	2.1	Explain the aims, ethics, ethical policy, culture, past history and mission of a fundraising organisation			
		2.2	Explain the differences between restricted and unrestricted, and revenue and capital funds			
		2.3	Describe a fundraising organisation's brand, structure, personality and value			
		2.4	Explain roles and responsibilities involved in corporate fundraising			
		2.5	Describe the objectives, and schedule of activities for corporate fundraising			
		2.6	Describe the fundraising approaches to be used in corporate fundraising			
		2.7	Explain how to research possible corporate donors and roles involved in the process			
		2.8	Explain the importance of working with corporate donors with similar ethical policies and beliefs			
		2.9	Describe the information included in corporate fundraising plans			
		2.10	Explain where to find information regarding potential and existing supporters			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in corporate fundraising	3.1	Summarise processes for consultation and approval of a corporate fundraising plan			
		3.2	Describe organisational roles involved in consulting relevant stakeholders on corporate fundraising plans			
		3.3	Describe roles involved in helping to sustain and monitor local connections and relationships			
4	Know how to gain corporate support	4.1	Explain the importance of partnership agreements and memoranda of understanding			
		4.2	Explain how organisations administer different forms of corporate fundraising			
		4.3	Describe organisational roles for administering different forms of corporate fundraising			
		4.4	Describe techniques for asking corporate donors for support			
5	Know how to manage a corporate fundraising plan	5.1	Describe the information systems used to manage corporate fundraising			
		5.2	Explain how records are kept up to date			
		5.3	Explain how to maintain records of own work			
		5.4	Describe the information required to measure the return on investment			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 14: Know how to plan and support the generation of grant income

Unit reference number: H/503/1535

QCF level: 3

Credit value: 6

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand grant income generation	1.1	Describe different forms of grant income			
		1.2	Describe techniques involved in generating grant income			
		1.3	Evaluate the strengths and weaknesses of grant income fundraising			
		1.4	Explain the similarities between grant income fundraising and other fundraising disciplines			
		1.5	Describe typical characteristics of grant makers			
		1.6	Explain the importance of working with donors with similar ethical policies and beliefs			
		1.7	List the legislation, regulations and codes of practice relevant to grant income fundraising			
		1.8	Explain the impact of relevant legislation, regulations and codes of practice on grant fundraising plans			
		1.9	Summarise the role of third party promotions in grant income fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan the generation of grant income	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Explain the difference between restricted and unrestricted funds			
		2.3	Explain roles and responsibilities involved in grant income fundraising			
		2.4	Describe the objectives and schedule of activities for grant income fundraising			
		2.5	Describe the fundraising approaches to be used to generate grant income			
		2.6	Explain roles involved in researching possible donors			
		2.7	Explain how tax-effective giving applies to grant income fundraising			
		2.8	Describe the information included in grant fundraising plans and proposals			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in grant fundraising	3.1	Summarise processes for consultation and approval of a grant fundraising plan			
		3.2	Describe organisational roles involved in consulting relevant stakeholders on grant fundraising plans			
		3.3	Describe roles involved in helping to sustain and monitor local connections and relationships			
		3.4	Describe techniques used to ask grant makers for support			
4	Know how to manage a grant fundraising plan	4.1	Describe the information systems used to manage grant income fundraising			
		4.2	Explain how records are kept up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment			
		4.5	Explain organisational roles for providing feedback to individual grant makers			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 15: **Know how to plan and support fundraising through electronic media**

Unit reference number: L/503/1545

QCF level: 3

Credit value: 6

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand electronic media fundraising	1.1	Explain motives for online giving			
		1.2	Evaluate the strengths and weaknesses of electronic media in relation to fundraising			
		1.3	Describe techniques involved in fundraising through electronic media			
		1.4	Explain the latest trends in electronic media			
		1.5	List the legislation, regulations and codes of practice relevant to electronic media fundraising			
		1.6	Explain the impact of relevant legislation, regulations and codes of practice on electronic media fundraising			
		1.7	Explain the guidelines to follow when working with a professional fundraising organisation			
		1.8	Explain the similarities between electronic media based fundraising and other fundraising disciplines			
		1.9	Summarise the role of third party promotions in electronic media fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan fundraising through electronic media	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Describe the features of an organisation's existing relationship with an electronic media supplier			
		2.3	Describe the objectives and schedule of activities for electronic media fundraising			
		2.4	Describe the fundraising approaches to be used in electronic media fundraising			
		2.5	Explain roles involved in researching possible donors			
		2.6	Explain how to write a clear and comprehensive e-fundraising plan			
		2.7	Explain organisational roles for writing clear and comprehensive e-fundraising plans			
		2.8	Explain how tax-effective giving applies to electronic media based fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in electronic media fundraising	3.1	Summarise processes for consultation and approval of an electronic media fundraising plan			
		3.2	Describe organisational roles involved in consulting relevant stakeholders on electronic media fundraising plans			
		3.3	Describe organisational roles for sustaining and monitoring local connections and relationships			
		3.4	Describe techniques for asking for support			
		3.5	Explain organisational roles for recruiting donors			
4	Know how to manage an e-fundraising plan	4.1	Describe the information systems used to manage electronic media based fundraising			
		4.2	Explain how records are kept up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment			
		4.5	Explain the importance of maintaining confidentiality of data			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 16: **Know how to plan and support the recruitment of donors using direct marketing media**

Unit reference number: K/503/1536

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising through direct marketing activity	1.1	Describe techniques involved in fundraising through direct marketing activity			
		1.2	Evaluate the strengths and weaknesses of direct marketing activity			
		1.3	Explain the similarities between direct marketing fundraising and other fundraising disciplines			
		1.4	Describe common motives donors for giving			
		1.5	Explain why organisations maintain supporter databases			
		1.6	Explain the guidelines to follow when working with a professional fundraising organisation			
		1.7	Explain the impact of relevant legislation, regulations and codes of practice			
		1.8	List the legislation, regulations and codes of practice relevant to direct marketing fundraising			
		1.9	Summarise the role of third party promotions in direct marketing media			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know how to plan fundraising through direct marketing activity	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Describe the features of an organisation's existing relationship with a direct marketing supplier			
		2.3	Describe the objectives and schedule of activities for direct marketing fundraising			
		2.4	Describe the fundraising approaches to be used in direct marketing fundraising			
		2.5	Explain roles involved in researching possible donors			
		2.6	Explain how to write a clear and comprehensive direct marketing plan and the purpose of each step			
		2.7	Explain organisational roles for writing clear and comprehensive marketing plans			
		2.8	Explain how tax-effective giving applies to direct marketing fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in direct marketing activities	3.1	Summarise processes for consultation and approval of the direct marketing plan			
		3.2	Describe organisational roles involved in consulting relevant stakeholders on direct marketing plans			
		3.3	Describe organisational roles for sustaining and monitoring local connections and relationships			
		3.4	Describe techniques for asking for support			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to support the recruitment of donors through direct marketing activity	4.1	Summarise different forms of marketing media and types of potential suppliers			
		4.2	Summarise different techniques for recruiting donors through direct marketing			
		4.3	Describe the types of donor information available from analysing databases			
		4.4	Explain organisational roles for recruiting donors through direct marketing			
5	Know how to manage a direct marketing activity plan	5.1	Describe the information systems used to manage direct marketing fundraising			
		5.2	Explain how records are kept up to date			
		5.3	Explain how to maintain records of own work			
		5.4	Describe the information required to measure the return on investment of direct marketing			
		5.5	Explain the importance of maintaining confidentiality of data			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 17: Support others in the achievement of fundraising work

Unit reference number: M/503/1537

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising work	1.1	Summarise the aims, ethics, culture, past history and mission of a fundraising organisation			
		1.2	Explain the impact of legislation, regulations and codes of practice on fundraising activities			
		1.3	List the legislation, regulations and codes of practice relevant to major fundraising activities			
		1.4	Summarise the role and value of volunteering			
		1.5	Explain motivations for volunteering			
		1.6	Explain reasons why volunteers stop volunteering			
2	Understand own role and role of the team	2.1	Explain own role, responsibilities and level of authority within the team			
		2.2	Explain own and the team's objectives			
		2.3	Summarise the fundraising methods used by the team			
		2.4	Explain own opportunities for advancement within the voluntary sector			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to support others in fundraising work	3.1	Explain how to communicate with different people for support and feedback			
		3.2	Summarise different methods of reviewing own and teams' work			
		3.3	Explain how to solve problems in accordance with legislation and organisational requirements			
4	Be able to support the team	4.1	Communicate tasks, methods and responsibilities to the team			
		4.2	Advise team members on how to achieve objectives			
		4.3	Provide support to team members			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 18: **Know how to plan and support major gift fundraising**

Unit reference number: Y/503/3153

QCF level: 3

Credit value: 6

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand major gift fundraising	1.1	Describe types of major gift support			
		1.2	Describe techniques involved in major gift fundraising			
		1.3	Evaluate the strengths and weaknesses of major gift fundraising			
		1.4	Explain the similarities between major donor fundraising and other fundraising disciplines			
		1.5	Explain motives donors may have for giving			
		1.6	Describe a capital appeal			
		1.7	Describe key features of an organisation's existing relationship with a major donor			
		1.8	Explain the importance of working with donors with similar ethical policies and beliefs			
		1.9	Explain tax implications of major gifts			
		1.10	List the legislation, regulations and codes of practice relevant to major gift fundraising			
		1.11	Explain the impact of relevant legislation, regulations and codes of practice, including data protection, on major gift fundraising plans			
		1.12	Summarise the role of third party promotions in major gift fundraising			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Know the information required to plan major gift fundraising	2.1	Explain the aims, ethics, culture, past history and mission of a fundraising organisation			
		2.2	Explain the differences between restricted and unrestricted , and revenue and capital funds			
		2.3	Explain roles involved in researching possible donors			
		2.4	Describe the objectives and schedule of activities for major gift fundraising			
		2.5	Describe the fundraising approaches to be used in major gift fundraising			
		2.6	Describe the information organisations include in a major gift fundraising plan			
		2.7	Describe the resources used in major gift fundraising			
		2.8	Describe organisational roles for implementing the major gift fundraising plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to consult others in major gift fundraising	3.1	Summarise processes for consultation and approval of a major gift fundraising plan			
		3.2	Describe organisational roles involved in consulting stakeholders on major gift fundraising plans			
		3.3	Describe roles involved in helping to sustain and monitor local connections and relationships			
		3.4	Describe techniques used to ask major gift donors for support			
		3.5	Explain organisational roles and responsibilities for asking major gift donors for support			
4	Know how to manage a major gift fundraising plan	4.1	Summarise the information systems used to manage major gift fundraising			
		4.2	Explain how records are kept up to date			
		4.3	Explain how to maintain records of own work			
		4.4	Describe the information required to measure the return on investment			

Learner name: _____
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Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
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Date: _____

Unit 19: Monitor the programme of work**Unit reference number:** A/503/2321**QCF level:** 3**Credit value:** 3**Guided learning hours:** 15

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the programme of work	1.1	Explain the aims and objectives of the work			
		1.2	Define roles and responsibilities of those involved in the work			
		1.3	Describe the timescales and milestones for the work			
		1.4	Describe the intended outputs and/or outcomes of the work			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand monitoring activities	2.1	Explain the difference between monitoring and evaluation activities			
		2.2	Explain the importance of monitoring the progress of work			
		2.3	Describe techniques and tools used to monitor progress			
		2.4	Define any risks to the work and possible actions to mitigate them			
		2.5	Describe the types of data monitoring activities can produce and how they can be used			
		2.6	Describe any external factors that may influence the work			
		2.7	Explain how to monitor performance against work objectives			
		2.8	Describe procedures for reporting results			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor the progress of the programme of work	3.1	Identify roles and responsibilities in the monitoring process			
		3.2	Select tools and techniques to monitor the progress of work			
		3.3	Record the progress of work at designated intervals			
		3.4	Monitor progress against the milestones, objectives and timescales for the work			
		3.5	Report results of monitoring work to the appropriate person/s			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 20: Evaluate the programme of work**Unit reference number:** T/503/2317**QCF level:** 3**Credit value:** 4**Guided learning hours:** 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the programme of work	1.1	Explain the aims and objectives of the work			
		1.2	Define roles and responsibilities of those involved in the work			
		1.3	Describe the timescales and milestones for the work			
		1.4	Describe the intended outcomes of the work			
2	Understand evaluation activities	2.1	Explain the difference between monitoring and evaluation activities			
		2.2	Explain the importance of evaluating the progress of work			
		2.3	Explain the benefits of having an evaluation framework to inform monitoring and evaluation activities			
		2.4	Describe techniques and tools used to evaluate work			
		2.5	Describe benchmarks and standards that can be used to evaluate performance			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to evaluate a programme of work	3.1	Describe the information required to evaluate performance			
		3.2	Explain how to gather the information required to evaluate performance			
		3.3	Explain how to evaluate performance against work objectives, benchmarks and standards of performance			
		3.4	Describe any external factors that may influence the work			
		3.5	Describe the reporting requirements for the evaluation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to evaluate the programme of work	4.1	Identify roles and responsibilities in the evaluation process			
		4.2	Select tools, techniques, benchmarks and standards to use when evaluating work			
		4.3	Gather the information required using appropriate techniques and evidence sources			
		4.4	Record information about the progress of work at designated intervals			
		4.5	Assess the progress of the work against work objectives, benchmarks and standards of performance			
		4.6	Assess the impact of external factors on the work			
		4.7	Draw conclusions and make recommendations for future practice that are evidence based			
		4.8	Report on the results of the evaluation to relevant colleagues and stakeholders, including areas for improvements and change			

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Unit 21: Ensure your own actions reduce risks to health and safety

Unit reference number: K/502/7986

QCF level: 3

Credit value: 2

Guided learning hours: 6

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand legal and organisational requirements in relation to health and safety	1.1	Describe the key features of the legislation, policies, procedures, codes of practice and guidelines in relation to duties for health and safety in the workplace			
		1.2	Explain the reasons why it is important to take action to reduce risks to health and safety in accordance with relevant legal and organisational requirements			
		1.3	Identify the risks to health and safety that may arise in the workplace, and describe the actions required to deal with them			
		1.4	Identify the 'responsible persons' to whom health and safety matters should be reported			
		1.5	Explain the importance of personal conduct and personal presentation in maintaining own health and safety and that of others			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify hazards and evaluate risks in the workplace	2.1	Identify aspects of the workplace and working practices which pose potential risks to self and others			
		2.2	Evaluate potentially harmful working practices identifying those which present the highest risk to self or others			
		2.3	Report high risk hazards to the 'responsible person'			
3	Be able to reduce risks to health and safety in the workplace	3.1	Take action to deal with health and safety issues			
		3.2	Make suggestions for reducing risks to health and safety to the 'responsible persons'			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Guided learning hours: 18

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Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand their organisation's policies, procedures and practices for safe working with children, young people and vulnerable adults	1.1	Explain their organisation's policies and practice for safe working that protect children, young people and vulnerable adults and adults who work with them			
		1.2	Describe their own role at work in contributing to safeguarding children, young people and vulnerable adults			
		1.3	Describe how their organisation's safe working practices comply with legislation that covers data protection, information handling and sharing			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand the importance of working in partnership with other organisations to safeguard children, young people and vulnerable adults	2.1	Explain the importance of safeguarding children, young people and vulnerable adults			
		2.2	Explain child protection within the wider concept of safeguarding			
		2.3	Explain the importance of a person centred approach			
		2.4	Explain what is meant by partnership working in the context of safeguarding			
		2.5	Describe the roles and responsibilities of the different organisations that may be involved when a child, young person or vulnerable adult that has been abused or harmed			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to respond to evidence or concerns that a child or young person has been abused or harmed	3.1	Describe the possible signs, symptoms, indicators and behaviours that may cause concern in the context of safeguarding			
		3.2	Describe the actions their organisation expects them to take if a child or young person or vulnerable adult alleges harm or abuse			
		3.3	Explain the rights that children, young people, vulnerable adults and their families have in situations where harm or abuse is suspected or alleged			

Learner name: _____

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(if sampled)

Unit 23: Set objectives and provide support for team members

Unit reference number: M/600/9600

QCF level: 3

Credit value: 5

Guided learning hours: 35

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to communicate a team's purpose and objectives to the team members	1.1	Describe the purpose of a team			
		1.2	Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)			
		1.3	Communicate the team's purpose and objectives to its members			
2	Be able to develop a plan with team members showing how team objectives will be met	2.1	Discuss with team members how team objectives will be met			
		2.2	Ensure team members participate in the planning process and think creatively			
		2.3	Develop plans to meet team objectives			
		2.4	Set SMART personal work objectives with team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to support team members identifying opportunities and providing support	3.1	Identify opportunities and difficulties faced by team members			
		3.2	Discuss identified opportunities and difficulties with team members			
		3.3	Provide advice and support to team members to overcome identified difficulties and challenges			
		3.4	Provide advice and support to team members to make the most of identified opportunities			
4	Be able to monitor and evaluate progress and recognise individual and team achievement	4.1	Monitor and evaluate individual and team activities and progress			
		4.2	Provide recognition when individual and team objectives have been achieved			

Learner name: _____ Date: _____
 Learner signature: _____ Date: _____
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 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 24: **Support team members in identifying, developing and implementing new ideas**

Unit reference number: L/600/9636

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to develop team ideas and develop the creativity of team members	1.1	Encourage team members to identify ideas			
		1.2	Record team members' ideas			
2	Be able to assess the viability of team members' ideas	2.1	Assess with team members the potential benefits and risks associated with an idea, and the resources required			
3	Be able to support team members to implement ideas	3.1	Explain how to support team members in submitting formal proposals for approval			
		3.2	Explain to team members how to identify and overcome barriers to implementing an idea			
4	Be able to implement team ideas	4.1	Monitor the implementation of ideas by own team			
		4.2	Communicate the progress of implementation to relevant others own organisation			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Guided learning hours: 10

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify circumstances that require a decision to be made	1.1	Explain the circumstances requiring a decision to be made			
		1.2	State the desired objective(s) for making a decision			
		1.3	Establish criteria on which to base the decision, in line with own organisation			
2	Be able to collect information to inform decision-making	2.1	Identify information needed to inform the decision-making process			
		2.2	Communicate with stakeholders affected by the decision			
		2.3	Explain how to inform stakeholders about the decision-making process			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to analyse information to inform decision-making	3.1	Identify information for validity and relevance to the decision-making process			
		3.2	Analyse information and against established criteria			
4	Be able to make a decision	4.1	Apply decision-making technique(s) to determine a decision			
		4.2	Explain the decision made in line with desired objectives			
		4.3	Communicate the decision taken to relevant stakeholders			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 26: Managing and developing relationships in the workplace

Unit reference number: D/502/0145

QCF level: 3

Credit value: 2

Guided learning hours: 8

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Examine the needs and expectations of others	1.1	Identify and examine the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace			
		1.2	Explain the importance of knowing what customers, colleagues, key stakeholders and relevant others in the workplace require			
2	Meet the needs and expectations of others	2.1	Determine ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace within organisational constraints			
		2.2	Explain ways of checking that the needs and expectations of others have been met			
3	Be able to manage relationships where it is not possible to meet the need or expectations of others	3.1	Examine and explain ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
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<i>(if sampled)</i>			

Unit 27: Plan and organise an event**Unit reference number:** R/601/2540**QCF level:** 3**Credit value:** 4**Guided learning hours:** 28

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the role of an event organiser in planning an event	1.1	Explain the purpose and benefits of planning an event			
		1.2	Explain the role of the event organiser in: i) meeting the objectives of the event ii) agreeing a brief and budget for the event			
		1.3	Identify and evaluate the types of risks associated with events and explain how to minimise these			
		1.4	Explain the purpose and benefits of a contingency plan for an event			
		1.5	Describe the types of problems that may occur when organising an event and how to solve them			
		1.6	Categorise different types of events and their main features			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand the arrangements to be made when planning and organising an event	2.1 Explain the role of the event organiser for i) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements ii) meeting relevant health, safety and security arrangements iii) meeting legal and organisational requirements for contracts iv) organising resources and the production of event materials v) the types of activities and resources that may be needed during an event vi) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the different types of venues and resources needed for different types of events	3.1	Identify and evaluate different types of venue in terms of suitability for events and costs			
		3.2	Describe a range of resources that may be needed for events and illustrate how they may be used			
		3.3	Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to plan and organise an event	4.1	Agree an event brief and budget			
		4.2	Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies			
		4.3	Identify and agree resources and support needed for organising an event			
		4.4	Agree requirements for venue(s)			
		4.5	Identify venue and agree costings			
		4.6	Liaise with the venue to confirm event requirements and/or any special delegate requirements			
		4.7	Agree requirements for resources			
		4.8	Co-ordinate resources and production of event materials			
		4.9	Make sure arrangements are in place for the event to meet relevant health, safety and security requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	4.10	Make sure legal and organisational requirements for contracts are met				
	4.11	Make sure that all those involved are briefed and trained to fulfil their roles				
	4.12	Delegate functions to the event team as required				
	4.13	Make arrangements for rehearsals to make sure the event runs smoothly, if required				
	4.14	Make sure invitations are sent out to delegates				
	4.15	Manage delegate responses				
	4.16	Prepare joining instructions and event materials to be sent to delegates				

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 28: Negotiation and influencing**Unit reference number:** H/502/0129**QCF level:** 3**Credit value:** 6**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the aims and principles of effective negotiation and influencing skills	1.1	Assess the factors that influence negotiations			
		1.2	Explain and illustrate stages in the negotiation process			
		1.3	Explain and illustrate the importance of establishing a win:win situation and how it is more effective than other negotiating positions (win:lose, lose:lose, lose:win)			
2	Know a variety of negotiation and influencing techniques and when they should be used	2.1	Evaluate variety of influencing and negotiating techniques and explain when they might be used			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to demonstrate effective negotiation and influencing skills based on reflective practice	3.1	Establish an effective method of recording each stage of a negotiation			
		3.2	Plan and record negotiations over a period of at least a month, describing and justifying approaches and outcomes			
		3.3	Evaluate to what extent a win:win situation has been achieved following each negotiation			
		3.4	Work with colleagues, where relevant, to assess how approaches and outcomes have evolved based on experience, and develop and action plan to improve practice			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 29: Manage customer service in own area of responsibility

Unit reference number: D/600/9804

QCF level: 3

Credit value: 4

Guided learning hours: 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to establish and communicate measurable customer service standards for own area of responsibility	1.1	State organisational, legal and regulatory requirements for customer service standards			
		1.2	Explain expected standards for customer service performance to employees in own area of responsibility			
		1.3	Describe measurement criteria to monitor customer service performance			
2	Be able to support staff in meeting customer service standards	2.1	Identify staff and other resources to meet customer service standards			
		2.2	Communicate roles and responsibilities to employees and provide support			
		2.3	Describe how to resolve customer service queries within own organisation's policy			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor and evaluate customer service performance, systems and processes	3.1	Monitor customer service performance against established criteria			
		3.2	Analyse feedback from staff and customers on the quality of customer service			
		3.3	Evaluate customer feedback and identify areas for improvement			
		3.4	Recommend changes to customer service processes or standards based on performance evaluation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 30: Develop a presentation**Unit reference number:** M/601/2528**QCF level:** 3**Credit value:** 3**Guided learning hours:** 15

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of preparing for and evaluating a presentation	1.1	Explain the purpose of using different types of presentation and equipment to provide information			
		1.2	Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies			
		1.3	Explain the benefits of preparing for giving a presentation			
		1.4	Explain and illustrate how presentations may be enhanced by materials and equipment			
		1.5	Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop a presentation	2.1	Agree and confirm audience, purpose, content, style and timing of a presentation			
		2.2	Research and plan a presentation			
		2.3	Select any equipment needed for the presentation			
		2.4	Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience			
		2.5	Obtain feedback on planned presentation and make adjustments, if required			
		2.6	Produce presentation handouts			
		2.7	Collect feedback on the written presentation			
		2.8	Reflect on the feedback obtained of the written presentation and identify learning points			
		2.9	Identify changes that will improve future written presentations			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Unit 31: Support marketing activities**Unit reference number:** F/601/6499**QCF level:** 3**Credit value:** 4**Guided learning hours:** 24

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand marketing principles and the importance of branding and corporate identity in marketing	1.1	Identify the key principles of marketing			
		1.2	Explain the importance of branding and corporate identity in marketing			
2	Be able to identify the target audience and desired outcomes of marketing activity	2.1	Identify, through discussion with others the: • target audience for marketing activities and materials • desired outcome of marketing activities and materials			
3	Be able to support the preparation, costing and implementation of an ongoing marketing plan	3.1	Support the preparation, costing and implementation of an ongoing marketing plan, taking into consideration: • relevant legislation • codes of conduct • internal and external policies and guidelines			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to support the production of marketing materials	4.1	Ensure that marketing and advertising branding is accurate, up to date and conforms to client's or own company brand guidelines			
		4.2	Ensure marketing materials are appropriate for the target audience and intended purpose			
5	Be able to collect and analyse data to inform future actions	5.1	Identify strategies for collecting data to measure the effectiveness of marketing activities, working with others			
		5.2	Produce and analyse data against success indicators			
		5.3	Use the results of the analysis to inform future actions			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 32: Project management**Unit reference number:** Y/501/5168**QCF level:** 3**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of project management	1.1	Explain the difference between routine work and taking part in a project			
		1.2	Explain why it is important to agree the purpose, scope, timescale, resource requirements, budget, aims and objectives of a project			
		1.3	Describe how to identify project issues and risks			
		1.4	Describe how to plan projects using appropriate techniques			
		1.5	Describe suitable methods for monitoring progress towards outcomes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to produce a project plan to achieve specified aims and outcomes	2.1	Establish the project's scope and its contribution to the wider objectives of the organisation			
		2.2	Set project aims and project outcomes and identify measures by which the outcomes will be judged			
		2.3	Estimate costs and timeframe			
		2.4	Identify suitable methods for monitoring progress towards outcomes			
		2.5	Draft a plan for the given project using appropriate techniques			
		2.6	Use feedback from appropriate people and agree final plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement the project plan	3.1	Agree roles and responsibilities of self and others contributing to the project			
		3.2	Carry out own responsibilities to quality standards			
		3.3	Adapt activities to changing requirements			
		3.4	Communicate with team members, and exchange information, in ways that help to meet project objectives			
		3.5	Monitor and record progress, and amend plan as needed			
4	Be able to evaluate the success of the project	4.1	Use appropriate methods to evaluate the project			
		4.2	Report on the extent to which the outcomes of the project were achieved			
		4.3	Describe the costs and benefits resulting from completion of the project			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature: <i>(if sampled)</i>	_____	Date:	_____

Unit 33: Working in administration**Unit reference number:** A/505/7011**QCF level:** 2**Credit value:** 6**Guided learning hours:** 60

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know the role of an administrator within business and administration	1.1	Describe the role of administrator within business and administration			
		1.2	Describe how the role of administrator relates to others within the business organisation			
2	Understand legislation affecting the work of administrators within a business environment	2.1	Explain the importance of legislation affecting the work of the administrator within a business environment			
		2.2	Explain how data protection legislation could affect the work of an administrator			
3	Understand health and safety issues that affect the work of administrators within a business environment	3.1	Explain how health and safety issues could affect the work of administrators within a business environment			
4	Understand the importance of organising their work area within a business environment	4.1	Explain the importance of organising the work area within a business environment			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to carry out administrative processes in a business environment	5.1	Use office equipment to complete administrative tasks according to organisational procedures			
		5.2	File business documents in accordance with organisational procedures			
		5.3	Handle mail to comply with the requirements of a business environment including • Incoming mail • Outgoing mail			
6	Be able to reflect on own performance when carrying out administrative tasks in a business environment	6.1	Identify own strengths and weakness in carrying out administrative tasks in a business environment			
		6.2	Identify ways to improve own performance when carrying out administrative tasks in a business environment			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 34: Introduction to campaigning**Unit reference number:** A/503/2318**QCF level:** 2**Credit value:** 5**Guided learning hours:** 40

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand campaigning	1.1	Define campaigning activities			
		1.2	Explain how campaigning activities overlap with fundraising and other voluntary sector activities			
		1.3	Describe the wider campaigning environment and the impact it can have on a campaign			
		1.4	Define the legal environment and rights and restrictions of campaigners			
		1.5	Describe the roles beneficiaries can play in a campaign and why their involvement may be important			
		1.6	Describe the advantages and disadvantages of collaborative campaigning			
		1.7	Describe the differences between proactive and reactive campaigning			
		1.8	Describe the importance of maintaining confidentiality in a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand campaign strategies	2.1	Describe the process for determining when a campaign is required			
		2.2	Describe the importance of SMART aims and objectives for a campaign			
		2.3	Describe the importance of research to a campaign			
		2.4	Describe the importance of developing a work plan for a campaign			
		2.5	Describe the importance of maintaining up-to-date knowledge of issues of relevance to a campaign, including other campaigns			
		2.6	Describe the importance of monitoring and reviewing a campaign as it progresses			
		2.7	Describe the importance of measuring the success and effectiveness of campaigns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand campaigning techniques, methods and audiences	3.1	Describe different types of campaigning techniques and methods and their advantages and disadvantages			
		3.2	Explain the importance of having campaigning techniques and methods that are relevant to campaign ideas			
		3.3	Describe the difference between campaign targets and audiences			
		3.4	Describe the importance of influencing targets and audiences			
		3.5	Describe types of campaign message			
		3.6	Describe ways of communicating campaign messages			
		3.7	Explain the importance of accuracy when developing campaign messages			
		3.8	Describe different types of materials and products that can be used in a campaign			
		3.9	Outline the role of the media in campaigning			

Learner name:	_____	Date:	_____
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Internal verifier signature:	_____	Date:	_____
<i>(if sampled)</i>			

Unit 35: Introduction to managing volunteers

Unit reference number: T/503/2320

QCF level: 2

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand managing volunteers	1.1	Outline the role of managing volunteers			
		1.2	Define the key responsibilities involved in managing volunteers			
		1.3	Describe the benefits of volunteering to the organisation, volunteers and clients			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand policies and procedures relating to the management of volunteers	2.1	Describe the legal status of volunteers and their distinctiveness from and relationship to paid staff			
		2.2	Describe legal and policy issues relevant to managing volunteers			
		2.3	Explain the importance of having good practice policies and procedures relating to the management of volunteers			
		2.4	Outline the key elements of a good practice volunteer policy			
		2.5	Explain the importance of risk assessments and risk management when managing volunteers			
		2.6	Explain the importance of health and safety monitoring when managing volunteers			
		2.7	Outline statutory health and safety requirements relating to volunteers			
		2.8	Explain the importance of equality, diversity and inclusion			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the management of volunteers	3.1	Explain the importance of promoting volunteering within an organisation and to potential and actual volunteers			
		3.2	Describe processes for recruiting, inducting, retaining and recognising volunteers			
		3.3	Describe the importance of managing own work, responsibilities and relationships			
		3.4	Outline techniques for leading, motivating, supervising, supporting and developing volunteers			
		3.5	Describe techniques for managing and communicating with volunteers			
		3.6	Describe the importance of tailoring own management style and communication techniques to individual volunteers			
		3.7	Describe techniques for assessing volunteers' performance			
		3.8	Explain the importance of providing feedback to volunteers			
		3.9	Describe ways that management techniques can improve volunteers' performance			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
<i>(if sampled)</i>			

Pearson BTEC Level 3 Diploma in Volunteer Management (QCF)

Mandatory units

Unit 1: Supervise and support volunteers**Unit reference number:** Y/602/5290**QCF level:** 3**Credit value:** 6**Guided learning hours:** 24

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to encourage the development of volunteers	1.1	Assess the skills and activities of volunteers			
		1.2	Identify methods for improving the effectiveness of volunteer skills			
		1.3	Agree a skills development plan for specified volunteers			
		1.4	Identify when volunteers may need additional support			
		1.5	Agree a plan for accessing appropriate additional support if required			
2	Be able to provide appropriate and effective support to volunteers	2.1	Explain how to promote a culture of positive development and learning			
		2.2	Identify the impact of a blame culture and explain how a blame culture might affect motivation and personal development			
		2.3	Explain how to encourage reflection and objective feedback			
		2.4	Give positive and constructive feedback			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to evaluate volunteer activities and achievements in a constructive manner.	3.1	Evaluate and record the achievements of volunteers			
		3.2	Identify ways of celebrating the achievements of volunteers			
		3.3	Identify how to encourage and motivate volunteers			
4	Understand how to communicate and exchange feedback with volunteers.	4.1	Explain the purpose of feedback in supporting the role of the volunteer			
		4.2	Identify suitable opportunities to exchange feedback with volunteers			
		4.3	Provide and record effective and appropriate feedback to volunteers			

Learner name: _____ Date: _____
 Learner signature: _____ Date: _____
 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 2: **Promote volunteering within your organisation and to volunteers****Unit reference number:** R/602/5286**QCF level:** 3**Credit value:** 3**Guided learning hours:** 16

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the need to promote volunteering	1.1	Identify the types of people who volunteer			
		1.2	Define the volunteer roles in the organisation			
		1.3	Describe the knowledge, skills and experience required of the volunteers			
		1.4	Identify the key motivations people have in volunteering			
		1.5	Describe the communication methods needed to access groups of potential volunteers			
2	Be able to promote volunteering to key people in the organisation	2.1	Identify the value volunteers make to the organisations goals			
		2.2	Communicate with internal stakeholders the role of volunteers in the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to help people in the organisation support volunteers	3.1	Identify people's attitudes to volunteering			
		3.2	Explain how to help individuals to support volunteers and their contribution to the organisation			
		3.3	Communicate these in the organisation			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Set objectives and provide support for team members

Unit reference number: M/600/9600

QCF level: 3

Credit value: 5

Guided learning hours: 35

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to communicate a team's purpose and objectives to the team members	1.1	Describe the purpose of a team			
		1.2	Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)			
		1.3	Communicate the team's purpose and objectives to its members			
2	Be able to develop a plan with team members showing how team objectives will be met	2.1	Discuss with team members how team objectives will be met			
		2.2	Ensure team members participate in the planning process and think creatively			
		2.3	Develop plans to meet team objectives			
		2.4	Set SMART personal work objectives with team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to support team members identifying opportunities and providing support	3.1	Identify opportunities and difficulties faced by team members			
		3.2	Discuss identified opportunities and difficulties with team members			
		3.3	Provide advice and support to team members to overcome identified difficulties and challenges			
		3.4	Provide advice and support to team members to make the most of identified opportunities			
4	Be able to monitor and evaluate progress and recognise individual and team achievement	4.1	Monitor and evaluate individual and team activities and progress			
		4.2	Provide recognition when individual and team objectives have been achieved			

Learner name: _____ Date: _____
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 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 4: Encourage and motivate volunteers

Unit reference number: J/502/1645

QCF level: 3

Credit value: 5

Guided learning hours: 33

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to motivate volunteers by promoting the special ethos and values of volunteering	1.1	Assess the needs and wishes of individuals and/or groups to help determine the starting point for their involvement			
		1.2	Support volunteers in ways which match volunteer expectations, motivations and needs			
		1.3	Demonstrate an awareness of individual and/or group volunteers abilities and aptitudes			
		1.4	Recognise volunteers and their commitment which are likely to enhance their motivation to continue			
		1.5	Take account of equal opportunities issues as they affect volunteers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Recognise voluntary effort by valuing volunteer contributions	2.1	Show appreciation of the individual contributions made by volunteers by: (i) providing feedback to volunteers (ii) communicating this information to others			
		2.2	Encourage further development of volunteers capabilities			
		2.3	Record individual and group effort in terms of its worth and contribution to organisational objectives			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to motivate volunteers by promoting the special ethos and values of volunteering	3.1	Explain what volunteering entails and the implications of volunteering for the volunteer, the voluntary organisation and the client			
		3.2	Explain why people volunteer and why organisations involve volunteers			
		3.3	Explain ways of assessing and confirming the needs and wishes of individuals and/or groups to help determine the starting point for their involvement			
		3.4	Describe how equal opportunities issues and values affect volunteers and volunteering and the organisation			
		3.5	Explain ways of recognising the commitment of volunteers and how that will enhance their motivation to continue			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Understand how to recognise voluntary effort by valuing volunteer contributions	4.1	Explain how to respond positively to personal and group voluntary effort by: (i) providing feedback to volunteers (ii) communicating this information to others			
		4.2	Describe how to assess and record individual and group effort in terms of its worth and contribution to organisational objectives			
		4.3	Describe how to evaluate an individual's voluntary effort in ways which can help further his/her or a group's capabilities			
		4.4	Describe ways of recognising formally the skills and abilities shown			
		4.5	Describe how to provide feedback at an appropriate level in the organisation			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Guided learning hours: 24

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how risk management impacts upon a volunteering policy	1.1	Assess the organisational policy in relation to risk management			
		1.2	Identify good practice in relation to risk management for volunteers			
2	Be able to carry out and evaluate risk assessment	2.1	Identify and put in place measures to reduce risk			
		2.2	Ensure that appropriate legal requirements are met including adequate insurance levels			
		2.3	Evaluate the effectiveness of risk management procedures			
3	Be able to audit volunteer skills in relation to organisational goals	3.1	Assess the skills of potential volunteers			
		3.2	Explain how to match volunteer skills to organisational goals			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to enable staff to assess and manage risk when working with volunteers	4.1	Identify the elements of a positive risk management culture			
		4.2	Explain how to ensure that staff responsible for the recruitment and management of volunteers are competent to measure and manage risk			
		4.3	Develop a strategy for managing risk in relation to specific individuals, activities and volunteer roles			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 6: Introduction to managing volunteers

Unit reference number: T/503/2320

QCF level: 2

Credit value: 4

Guided learning hours: 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand managing volunteers	1.1	Outline the role of managing volunteers			
		1.2	Define the key responsibilities involved in managing volunteers			
		1.3	Describe the benefits of volunteering to the organisation, volunteers and clients			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand policies and procedures relating to the management of volunteers	2.1	Describe the legal status of volunteers and their distinctiveness from and relationship to paid staff			
		2.2	Describe legal and policy issues relevant to managing volunteers			
		2.3	Explain the importance of having good practice policies and procedures relating to the management of volunteers			
		2.4	Outline the key elements of a good practice volunteer policy			
		2.5	Explain the importance of risk assessments and risk management when managing volunteers			
		2.6	Explain the importance of health and safety monitoring when managing volunteers			
		2.7	Outline statutory health and safety requirements relating to volunteers			
		2.8	Explain the importance of equality, diversity and inclusion			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the management of volunteers	3.1	Explain the importance of promoting volunteering within an organisation and to potential and actual volunteers			
		3.2	Describe processes for recruiting, inducting, retaining and recognising volunteers			
		3.3	Describe the importance of managing own work, responsibilities and relationships			
		3.4	Outline techniques for leading, motivating, supervising, supporting and developing volunteers			
		3.5	Describe techniques for managing and communicating with volunteers			
		3.6	Describe the importance of tailoring own management style and communication techniques to individual volunteers			
		3.7	Describe techniques for assessing volunteers' performance			
		3.8	Explain the importance of providing feedback to volunteers			
		3.9	Describe ways that management techniques can improve volunteers' performance			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 7: Understand effective partnership working between organisations

Unit reference number: J/503/2323

QCF level: 2

Credit value: 4

Guided learning hours: 36

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how partnership working can help an organisation achieve its mission	1.1	Summarise different types of partnership, including networks, consortia, collaborations and formal partnerships			
		1.2	Describe the benefits and risks of partnership working			
		1.3	Describe types of partners and ways partnership working may help achieve a mission			
		1.4	Describe the advantages and disadvantages of partnership working for organisations with a shared mission			
2	Understand how partnership working is governed	2.1	Describe the policies and legislation that apply to partnership working			
		2.2	Describe the legislation, codes of practice and protocols that apply to confidentiality, data protection and information sharing			
		2.3	Describe ways partner organisations share decision making			
		2.4	Explain when to seek informal and formal legal advice on partnership arrangements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to work in partnership with other organisations	3.1	Describe the principles of working with other organisations, including consortia and groups			
		3.2	Describe ways to develop positive working relationships with colleagues in other organisations			
		3.3	Describe different forms of communication and their uses, including new and interactive media			
		3.4	Explain the importance of recording communications with partner organisations			

Learner name: _____

Date: _____

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Internal verifier signature: _____
(if sampled)

Date: _____

Unit 8: Managing volunteer agreements**Unit reference number:** L/602/5285**QCF level:** 3**Credit value:** 2**Guided learning hours:** 8

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the difference between volunteer and employee relationships	1.1	Describe four key differences between an employee and a volunteer			
		1.2	Explain the difference between a volunteer agreement and a contract of employment			
2	Understand good practice in the recruitment process for volunteers	2.1	Describe two official processes which apply to both employees and volunteers			
3	Understand good practice in volunteer agreements	3.1	Identify four key pieces of legislation that impact on good practice in volunteer agreements/relationships			
		3.2	Examine how legislation is implemented in your own organisation			

Learner name: _____

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(if sampled)

Optional units

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the organisation's policy, structure, systems and procedures that support volunteering	1.1	Evaluate the organisation's policy, structure, systems and procedures that support volunteering			
2	Be able to justify and design improvements to organisational structures, systems and procedures to support volunteering	2.1	Justify and design improvements to an organisational structure, system and procedure to support volunteering			
3	Be able to produce an action plan for the implementation of those improvements	3.1	Produce an action plan to implement improvements			

Learner name: _____

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Assessor signature: _____

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Internal verifier signature: _____
(if sampled)

Date: _____

Unit 10: Managing and developing relationships in the workplace

Unit reference number: D/502/0145

QCF level: 3

Credit value: 2

Guided learning hours: 8

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Examine the needs and expectations of others	1.1	Identify and examine the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace			
		1.2	Explain the importance of knowing what customers, colleagues, key stakeholders and relevant others in the workplace require			
2	Meet the needs and expectations of others	2.1	Determine ways of meeting the needs and expectations of customers, colleagues, key stakeholders and relevant others in the workplace within organisational constraints			
		2.2	Explain ways of checking that the needs and expectations of others have been met			
3	Be able to manage relationships where it is not possible to meet the need or expectations of others	3.1	Examine and explain ways of managing relationships where it is not possible to meet the need or expectations of others within organisational guidelines and constraints			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
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<i>(if sampled)</i>			

Unit 11: Ensure your own actions reduce risks to health and safety

Unit reference number: K/502/7986

QCF level: 3

Credit value: 2

Guided learning hours: 6

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand legal and organisational requirements in relation to health and safety	1.1	Describe the key features of the legislation, policies, procedures, codes of practice and guidelines in relation to duties for health and safety in the workplace			
		1.2	Explain the reasons why it is important to take action to reduce risks to health and safety in accordance with relevant legal and organisational requirements			
		1.3	Identify the risks to health and safety that may arise in the workplace, and describe the actions required to deal with them			
		1.4	Identify the 'responsible persons' to whom health and safety matters should be reported			
		1.5	Explain the importance of personal conduct and personal presentation in maintaining own health and safety and that of others			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify hazards and evaluate risks in the workplace	2.1	Identify aspects of the workplace and working practices which pose potential risks to self and others			
		2.2	Evaluate potentially harmful working practices identifying those which present the highest risk to self or others			
		2.3	Report high risk hazards to the 'responsible person'			
3	Be able to reduce risks to health and safety in the workplace	3.1	Take action to deal with health and safety issues			
		3.2	Make suggestions for reducing risks to health and safety to the 'responsible persons'			

Learner name: _____

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(if sampled)

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Unit 12: Build, support and manage a team

Unit reference number: F/600/9682

QCF level: 4

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose and required attributes of a team and select those that match the team's requirements	1.1	Explain the role of a team in the achievement of a specific project or activity			
		1.2	Identify the attributes needed within the team to achieve its objectives			
		1.3	Analyse the skills and knowledge of potential and current team members against the identified needs			
		1.4	Identify individuals whose attributes most closely match the identified requirements			
2	Be able to induct team members and communicate their roles and responsibilities	2.1	Communicate project aims and objectives to team members			
		2.2	Explain how to introduce team members to each other and discuss each member's role and responsibilities			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to support team development	3.1	Identify the stages of team development			
		3.2	Explain how to resolve conflict between team members			
		3.3	Describe methods of encouraging team members to share knowledge and skills to achieve project objectives			
		3.4	Explain how to encourage open communication, trust and respect between team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to manage team performance and understand how to disband a team	4.1	Monitor and review the performance of a team against its purpose			
		4.2	Communicate project developments and to team members and support any change in roles or responsibilities			
		4.3	Communicate team and individual successes to the all team members			
5	Understand how to disband team	5.1	Explain how to prepare team members for project conclusion			
		5.2	Describe how team is disbanded			

Learner name: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 13:

Manage own professional development within an organisation

Unit reference number: L/600/9586

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to assess own career goals and personal development	1.1	Identify own career and personal goals			
		1.2	Assess how own career goals affect work role and professional development			
2	Be able to set personal work objectives	2.1	Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives			
3	Be able to produce a personal development plan	3.1	Identify gaps between objectives set, own current knowledge and skills			
		3.2	Produce a development plan			
4	Be able to implement and monitor own personal development plan	4.1	Plan activities identified in own development plan			
		4.2	Explain how to monitor and review own personal development plan			

Unit 14: Plan, allocate and monitor work of a team

Unit reference number: Y/600/9669

QCF level: 3

Credit value: 5

Guided learning hours: 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to plan work for a team	1.1	Agree team objectives with own manager			
		1.2	Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team			
2	Be able to allocate work across a team	2.1	Discuss team plans with a team			
		2.2	Agree work allocation and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members			
		2.3	Agree standard of work required by team			
3	Be able to manage team members to achieve team objectives	3.1	Support all team members in order to achieve team objectives			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to monitor and evaluate the performance of team members	4.1	Assess team members' work against agreed standards and objectives			
		4.2	Identify and monitor conflict within a team			
		4.3	Identify causes for team members not meeting team objectives			
5	Be able to improve the performance of a team	5.1	Identify ways of improving team performance			
		5.2	Provide constructive feedback to team members to improve their performance			
		5.3	Implement identified ways of improving team performance			

Learner name: _____

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(if sampled)

Date: _____

Guided learning hours: 18

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand their organisation's policies, procedures and practices for safe working with children, young people and vulnerable adults	1.1	Explain their organisation's policies and practice for safe working that protect children, young people and vulnerable adults and adults who work with them			
		1.2	Describe their own role at work in contributing to safeguarding children, young people and vulnerable adults			
		1.3	Describe how their organisation's safe working practices comply with legislation that covers data protection, information handling and sharing			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand the importance of working in partnership with other organisations to safeguard children, young people and vulnerable adults	2.1	Explain the importance of safeguarding children, young people and vulnerable adults			
		2.2	Explain child protection within the wider concept of safeguarding			
		2.3	Explain the importance of a person centred approach			
		2.4	Explain what is meant by partnership working in the context of safeguarding			
		2.5	Describe the roles and responsibilities of the different organisations that may be involved when a child, young person or vulnerable adult that has been abused or harmed			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to respond to evidence or concerns that a child or young person has been abused or harmed	3.1	Describe the possible signs, symptoms, indicators and behaviours that may cause concern in the context of safeguarding			
		3.2	Describe the actions their organisation expects them to take if a child or young person or vulnerable adult alleges harm or abuse			
		3.3	Explain the rights that children, young people, vulnerable adults and their families have in situations where harm or abuse is suspected or alleged			

Learner name: _____

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(if sampled)

Unit 16: Monitor the programme of work**Unit reference number:** A/503/2321**QCF level:** 3**Credit value:** 3**Guided learning hours:** 15

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the programme of work	1.1	Explain the aims and objectives of the work			
		1.2	Define roles and responsibilities of those involved in the work			
		1.3	Describe the timescales and milestones for the work			
		1.4	Describe the intended outputs and/or outcomes of the work			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand monitoring activities	2.1	Explain the difference between monitoring and evaluation activities			
		2.2	Explain the importance of monitoring the progress of work			
		2.3	Describe techniques and tools used to monitor progress			
		2.4	Define any risks to the work and possible actions to mitigate them			
		2.5	Describe the types of data monitoring activities can produce and how they can be used			
		2.6	Describe any external factors that may influence the work			
		2.7	Explain how to monitor performance against work objectives			
		2.8	Describe procedures for reporting results			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor the progress of the programme of work	3.1	Identify roles and responsibilities in the monitoring process			
		3.2	Select tools and techniques to monitor the progress of work			
		3.3	Record the progress of work at designated intervals			
		3.4	Monitor progress against the milestones, objectives and timescales for the work			
		3.5	Report results of monitoring work to the appropriate person/s			

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Unit 17: Evaluate the programme of work**Unit reference number:** T/503/2317**QCF level:** 3**Credit value:** 4**Guided learning hours:** 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the programme of work	1.1	Explain the aims and objectives of the work			
		1.2	Define roles and responsibilities of those involved in the work			
		1.3	Describe the timescales and milestones for the work			
		1.4	Describe the intended outcomes of the work			
2	Understand evaluation activities	2.1	Explain the difference between monitoring and evaluation activities			
		2.2	Explain the importance of evaluating the progress of work			
		2.3	Explain the benefits of having an evaluation framework to inform monitoring and evaluation activities			
		2.4	Describe techniques and tools used to evaluate work			
		2.5	Describe benchmarks and standards that can be used to evaluate performance			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand how to evaluate a programme of work	3.1	Describe the information required to evaluate performance			
		3.2	Explain how to gather the information required to evaluate performance			
		3.3	Explain how to evaluate performance against work objectives, benchmarks and standards of performance			
		3.4	Describe any external factors that may influence the work			
		3.5	Describe the reporting requirements for the evaluation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to evaluate the programme of work	4.1	Identify roles and responsibilities in the evaluation process			
		4.2	Select tools, techniques, benchmarks and standards to use when evaluating work			
		4.3	Gather the information required using appropriate techniques and evidence sources			
		4.4	Record information about the progress of work at designated intervals			
		4.5	Assess the progress of the work against work objectives, benchmarks and standards of performance			
		4.6	Assess the impact of external factors on the work			
		4.7	Draw conclusions and make recommendations for future practice that are evidence based			
		4.8	Report on the results of the evaluation to relevant colleagues and stakeholders, including areas for improvements and change			

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Assessor signature:	_____	Date:	_____
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<i>(if sampled)</i>			

Unit 18: Budgeting for the Business**Unit reference number:** M/501/3927**QCF level:** 3**Credit value:** 3**Guided learning hours:** 12

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the relevance of budgets and the importance of operating within them	1.1	Explain the relevance of budgets and the importance of operating within them			
2	Be able to construct and manage a budget	2.1	Gather information and construct a simple budget for the business			
		2.2	Explain how to monitor the budget in order to control and enhance business performance			

Learner name: _____

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(if sampled)

Date: _____

Unit 19: Negotiation and Influencing**Unit reference number:** H/502/0129**QCF level:** 3**Credit value:** 6**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the aims and principles of effective negotiation and influencing skills	1.1	Assess the factors that influence negotiations			
		1.2	Explain and illustrate stages in the negotiation process			
		1.3	Explain and illustrate the importance of establishing a win:win situation and how it is more effective than other negotiating positions (win:lose, lose:lose, lose:win)			
2	Know a variety of negotiation and influencing techniques and when they should be used	2.1	Evaluate variety of influencing and negotiating techniques and explain when they might be used			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to demonstrate effective negotiation and influencing skills based on reflective practice	3.1	Establish an effective method of recording each stage of a negotiation			
		3.2	Plan and record negotiations over a period of at least a month, describing and justifying approaches and outcomes			
		3.3	Evaluate to what extent a win:win situation has been achieved following each negotiation			
		3.4	Work with colleagues, where relevant, to assess how approaches and outcomes have evolved based on experience, and develop and action plan to improve practice			

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Learner signature: _____

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(if sampled)

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Unit 20: Manage customer service in own area of responsibility**Unit reference number:** D/600/9804**QCF level:** 3**Credit value:** 4**Guided learning hours:** 25

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to establish and communicate measurable customer service standards for own area of responsibility	1.1	State organisational, legal and regulatory requirements for customer service standards			
		1.2	Explain expected standards for customer service performance to employees in own area of responsibility			
		1.3	Describe measurement criteria to monitor customer service performance			
2	Be able to support staff in meeting customer service standards	2.1	Identify staff and other resources to meet customer service standards			
		2.2	Communicate roles and responsibilities to employees and provide support			
		2.3	Describe how to resolve customer service queries within own organisation's policy			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor and evaluate customer service performance, systems and processes	3.1	Monitor customer service performance against established criteria			
		3.2	Analyse feedback from staff and customers on the quality of customer service			
		3.3	Evaluate customer feedback and identify areas for improvement			
		3.4	Recommend changes to customer service processes or standards based on performance evaluation			

Learner name: _____

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(if sampled)

Date: _____

Unit 21: Manage conflict in a team**Unit reference number:** R/600/9685**QCF level:** 3**Credit value:** 3**Guided learning hours:** 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to support team members' understanding of their role and position within a team	1.1	Communicate to team members the standards of work and behaviour expected of them			
		1.2	Explain how team members can work together and support each other			
2	Be able to take measures to minimise conflict within a team	2.1	Identify issues with organisational structures, systems or procedures that are likely to give rise to conflict			
		2.2	Identify potential conflict between team members			
		2.3	Explain action required to avoid potential conflict and agree strategies for conflict resolution			
3	Be able to understand how to encourage team members to resolve their own conflicts	3.1	Explain how team members can be encouraged to identify and resolve their own problems and conflicts			
		3.2	Explain how respect can be developed and maintained between team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to understand legal and organisational requirements concerning conflict	4.1	Explain legal and organisational requirements concerning conflict in own team			
		4.2	Explain how to maintain complete, accurate and confidential records of conflicts and their outcomes			

Learner name: _____ Date: _____

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Internal verifier signature: _____ Date: _____
(if sampled)

Unit 22: **Manage or support equality of opportunity, diversity and inclusion in own area of responsibility**

Unit reference number: M/600/9628

QCF level: 3

Credit value: 4

Guided learning hours: 20

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies	1.1	Explain how equality of opportunity, diversity and inclusion relate to legal, industry requirements and organisational policies			
		1.2	Describe how equality of opportunity, diversity and inclusion are considered in planning in own area of responsibility			
2	Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility	2.1	Outline an organisation's equality, diversity and inclusion policy and procedures			
3	Be able to monitor equality, diversity and inclusion within own area of responsibility	3.1	Monitor how equality, diversity and inclusion activities in own area of responsibility are in line with own organisation			

Learner name:	_____	Date:	_____
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Assessor signature:	_____	Date:	_____
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(if sampled)			

Guided learning hours: 10

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify circumstances that require a decision to be made	1.1	Explain the circumstances requiring a decision to be made			
		1.2	State the desired objective(s) for making a decision			
		1.3	Establish criteria on which to base the decision, in line with own organisation			
2	Be able to collect information to inform decision-making	2.1	Identify information needed to inform the decision-making process			
		2.2	Communicate with stakeholders affected by the decision			
		2.3	Explain how to inform stakeholders about the decision-making process			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to analyse information to inform decision-making	3.1	Identify information for validity and relevance to the decision-making process			
		3.2	Analyse information and against established criteria			
4	Be able to make a decision	4.1	Apply decision-making technique(s) to determine a decision			
		4.2	Explain the decision made in line with desired objectives			
		4.3	Communicate the decision taken to relevant stakeholders			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____
(if sampled)

Date: _____

Unit 24: Project management**Unit reference number:** Y/501/5168**QCF level:** 3**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of project management	1.1	Explain the difference between routine work and taking part in a project			
		1.2	Explain why it is important to agree the purpose, scope, timescale, resource requirements, budget, aims and objectives of a project			
		1.3	Describe how to identify project issues and risks			
		1.4	Describe how to plan projects using appropriate techniques			
		1.5	Describe suitable methods for monitoring progress towards outcomes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to produce a project plan to achieve specified aims and outcomes	2.1	Establish the project's scope and its contribution to the wider objectives of the organisation			
		2.2	Set project aims and project outcomes and identify measures by which the outcomes will be judged			
		2.3	Estimate costs and timeframe			
		2.4	Identify suitable methods for monitoring progress towards outcomes			
		2.5	Draft a plan for the given project using appropriate techniques			
		2.6	Use feedback from appropriate people and agree final plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement the project plan	3.1	Agree roles and responsibilities of self and others contributing to the project			
		3.2	Carry out own responsibilities to quality standards			
		3.3	Adapt activities to changing requirements			
		3.4	Communicate with team members, and exchange information, in ways that help to meet project objectives			
		3.5	Monitor and record progress, and amend plan as needed			
4	Be able to evaluate the success of the project	4.1	Use appropriate methods to evaluate the project			
		4.2	Report on the extent to which the outcomes of the project were achieved			
		4.3	Describe the costs and benefits resulting from completion of the project			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
<i>(if sampled)</i>			

Unit 25: Understand values, ethics and safeguarding in the voluntary sector

Unit reference number: R/503/2325

QCF level: 2

Credit value: 3

Guided learning hours: 26

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand values and ethics in the voluntary sector	1.1	Define the mission of a specific voluntary sector organisation			
		1.2	Describe the values, ethics and beliefs of a specific voluntary sector organisation			
		1.3	Describe how different organisations' values, ethics and beliefs influence their practice			
2	Understand the importance of equality, diversity and inclusion in the voluntary sector	2.1	Define equality, diversity and inclusion			
		2.2	Describe the importance of promoting equality, diversity and inclusion within the voluntary sector			
		2.3	Describe a specific voluntary sector organisation's commitment to equality and diversity			
		2.4	Describe the equality and diversity policies and legislation relevant to the voluntary sector			
		2.5	Explain why voluntary sector organisations conduct equality impact assessments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand safeguarding in the voluntary sector	3.1	Explain the importance of safeguarding in the voluntary sector			
		3.2	Describe the safeguarding policies and legislation relevant to the voluntary sector and a specific organisation			
		3.3	Describe how a specific voluntary sector organisation safeguards its service users			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 26: Speaking and listening skills**Unit reference number:** Y/503/3377**QCF level:** 2**Credit value:** 3**Guided learning hours:** 24

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to communicate with others	1.1	Use language and tone to respond to a range of situations			
		1.2	Illustrate actual and potential barriers to effective speaking and listening			
		1.3	Use strategies to overcome barriers to effective speaking and listening			
2	Be able to present information to others	2.1	Select features of effective communication			
		2.2	Present information in a logical manner			
		2.3	Present ideas in a logical manner			
		2.4	Speak clearly and coherently using appropriate pace and volume			
3	Be able to obtain information from others	3.1	Encourage others in a group to speak			
		3.2	Create opportunities for listeners to clarify or question information presented			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to engage in discussion	4.1	Demonstrate the ability to create relevant contributions and help to move discussion forward			
		4.2	Assess the need to adapt contributions to discussions to suit audience, context, purpose and situation			
		4.3	Use a range of phrases for interruption and change of topic			
		4.4	Select evidence to support opinions and arguments			
		4.5	Respond to criticism and criticise constructively			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 27: Working in administration**Unit reference number:** A/505/7011**QCF level:** 2**Credit value:** 6**Guided learning hours:** 60

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know the role of an administrator within business and administration	1.1	Describe the role of administrator within business and administration			
		1.2	Describe how the role of administrator relates to others within the business organisation			
2	Understand legislation affecting the work of administrators within a business environment	2.1	Explain the importance of legislation affecting the work of the administrator within a business environment			
		2.2	Explain how data protection legislation could affect the work of an administrator			
3	Understand health and safety issues that affect the work of administrators within a business environment	3.1	Explain how health and safety issues could affect the work of administrators within a business environment			
4	Understand the importance of organising their work area within a business environment	4.1	Explain the importance of organising the work area within a business environment			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to carry out administrative processes in a business environment	5.1	Use office equipment to complete administrative tasks according to organisational procedures			
		5.2	File business documents in accordance with organisational procedures			
		5.3	Handle mail to comply with the requirements of a business environment including • Incoming mail • Outgoing mail			
6	Be able to reflect on own performance when carrying out administrative tasks in a business environment	6.1	Identify own strengths and weakness in carrying out administrative tasks in a business environment			
		6.2	Identify ways to improve own performance when carrying out administrative tasks in a business environment			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 28: Introduction to campaigning**Unit reference number:** A/503/2318**QCF level:** 2**Credit value:** 5**Guided learning hours:** 40

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand campaigning	1.1	Define campaigning activities			
		1.2	Explain how campaigning activities overlap with fundraising and other voluntary sector activities			
		1.3	Describe the wider campaigning environment and the impact it can have on a campaign			
		1.4	Define the legal environment and rights and restrictions of campaigners			
		1.5	Describe the roles beneficiaries can play in a campaign and why their involvement may be important			
		1.6	Describe the advantages and disadvantages of collaborative campaigning			
		1.7	Describe the differences between proactive and reactive campaigning			
		1.8	Describe the importance of maintaining confidentiality in a campaign			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand campaign strategies	2.1	Describe the process for determining when a campaign is required			
		2.2	Describe the importance of SMART aims and objectives for a campaign			
		2.3	Describe the importance of research to a campaign			
		2.4	Describe the importance of developing a work plan for a campaign			
		2.5	Describe the importance of maintaining up-to-date knowledge of issues of relevance to a campaign, including other campaigns			
		2.6	Describe the importance of monitoring and reviewing a campaign as it progresses			
		2.7	Describe the importance of measuring the success and effectiveness of campaigns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand campaigning techniques, methods and audiences	3.1	Describe different types of campaigning techniques and methods and their advantages and disadvantages			
		3.2	Explain the importance of having campaigning techniques and methods that are relevant to campaign ideas			
		3.3	Describe the difference between campaign targets and audiences			
		3.4	Describe the importance of influencing targets and audiences			
		3.5	Describe types of campaign message			
		3.6	Describe ways of communicating campaign messages			
		3.7	Explain the importance of accuracy when developing campaign messages			
		3.8	Describe different types of materials and products that can be used in a campaign			
		3.9	Outline the role of the media in campaigning			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			

Unit 29: Introduction to fundraising**Unit reference number:** T/503/1538**QCF level:** 2**Credit value:** 4**Guided learning hours:** 30

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand fundraising activities	1.1	Define different forms and methods of fundraising			
		1.2	Describe the role and purpose of fundraising within an organisation			
		1.3	Describe the key elements of a case for support			
		1.4	Explain the purpose of donor research and its importance to building a case for support			
		1.5	Explain the importance of targeting appropriate support			
		1.6	Describe processes for asking for support			
		1.7	Explain the importance of understanding the motives supporters may have for offering support			
		1.8	Explain the importance of developing a clear and comprehensive fundraising plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand fundraising information and regulation	2.1	Describe sources of information to help with fundraising			
		2.2	Describe key fundraising codes of practice			
		2.3	Describe the importance of data protection and confidentiality in fundraising			
		2.4	Describe the work of the Fundraising Standards Board			
		2.5	Describe tax effective fundraising			
3	Understand funding sources and fundraising resources, income sources and budgets	3.1	Describe different sources of funding			
		3.2	Describe the types of resources used in different forms of fundraising			
		3.3	Explain the importance of working to a budget in fundraising			
		3.4	Explain the importance of measuring the return on investment			
		3.5	Explain the importance of recording information resulting from the fundraising approach			
		3.6	Explain the importance of maintaining supporter databases			

Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature: (if sampled)	_____	Date:	_____

Further information

For more information on Pearson qualifications please contact Customer Services.

Our Customer Service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DiDA and other qualifications	0844 576 0031

Calls may be recorded for quality and training purposes.

Useful publications

Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually
- Functional Skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Ofqual, August 2008)
- the current Pearson publications catalogue and update catalogue.

Publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Pearson website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

Professional development and training

Pearson supports UK and international customers with training related to NVQ and Pearson BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be an Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by an Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson QCF BTECs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to the Pearson's Equality Policy for further details.

www.edexcel.com/policies/Pages/home.aspx

Annexe C: Assessment guidance

Skills – Third Sector QCF Assessment Guidance

1 Introduction	
1.1	Skills – Third Sector is the strategic body for developing skills in charities, social enterprises and voluntary and community organisations. We want to make it easier for voluntary and community organisations and social enterprises to have the right skills to make a difference to people in their communities. As a part of this task, we have a responsibility to support and encourage the best possible quality of learning and assessment in accredited learning provision relevant to key occupational roles in voluntary, community and social enterprise organisations.
1.2	This document aims to provide guidance and encourage best assessment practice from assessment centres and Awarding Organisations. The information is intended to support the quality assurance processes of Awarding Organisations that offer qualifications in the sector, and should be read alongside these. It should also be read alongside individual unit assessment requirements.
1.3	The guidance will promote a consistent approach to those elements of assessment which require further interpretation and definition, and support sector confidence in the new arrangements.
2 Assessment Guidance	
2.1	Learners should be enabled to complete, wherever possible, real work activities that provide both evidence of underpinning knowledge and evidence of competence to demonstrate they have met the learning outcomes and assessment criteria of the QCF unit and that they are competent in relation to the NOS.
2.3	Skills – Third Sector encourages inclusion of the direct observation of practice, or feedback from an expert witness, in the assessment of competence based learning outcomes.
2.4	Simulation is not to be utilised as an assessment method for competence based learning outcomes except where naturally occurring opportunities are rare or unavailable. The unit assessment requirements will normally identify circumstances where this is acceptable. Any instances where simulation is being used should be approved in advance by the Awarding Organisation.

2 Assessment Guidance (<i>continued</i>)	
2.5	Assessment of knowledge based learning outcomes (eg those beginning with 'know' or 'understand' or 'be able to explain') should be linked to real work activities wherever possible.
2.6	Assessment decisions for knowledge based learning outcomes should be made by an assessor qualified to make assessment decisions who is also occupationally knowledgeable.
2.7	Continuing professional development of all assessors should be encouraged. Assessors working towards appropriate assessor qualifications or occupationally relevant qualifications should be encouraged and supported by more experienced assessors or internal verifiers. Where assessors are not yet fully qualified, their assessment decisions should be sampled or checked according to Awarding Organisation guidance provided to assessment centres.
3 Internal Quality Assurance	
3.1	Internal quality assurance is key to ensuring that the assessment of evidence for units is of a consistent and appropriate quality. The integrity of assessment and verification practices is of utmost importance to ensure that individual learner achievement is properly assessed and recognised. It is equally important in maintaining the reliability and value of the qualifications achieved.
3.2	Those carrying out internal quality assurance should be knowledgeable in the occupational area they are assuring and be qualified to make assurance decisions.
3.3	Awarding Organisations and assessment centres are encouraged to develop and support face to face or virtual assessor networks to encourage a sharing of relevant knowledge and skills that can enhance the validity and reliability of assessment practice. Where practicable, Skills – Third Sector will look for ways to encourage such networks for those working with learners from third sector organisations or undertaking relevant qualifications via the National Skills Networks, currently under development.

4 Glossary	
4.1 Occupationally competent:	Occupationally competent assessors should have both the knowledge and the competence needed to carry out the activities they are assessing. They should also understand the work environment in which the learner is operating [for example, the context of working in a voluntary organisation]. It is expected that they will engage in regular continuing learning and professional development to keep their occupational knowledge and skills up to date.
4.2 Occupationally knowledgeable:	This means that each assessor should possess relevant knowledge and understanding, and be able to assess this in units designed to test specific knowledge and understanding, or in units where knowledge and understanding are components of competency. This occupational knowledge should be maintained regularly through clearly demonstrable continued learning and professional development.
4.3 Qualified to make assessment decisions:	Each assessor should hold or be working towards an appropriate assessor qualification that will equip them to make appropriate and consistent assessment decisions.
4.4 Qualified to make quality assurance decisions:	Awarding Organisations will determine what will qualify those undertaking internal quality assurance to make decisions about that quality assurance.
4.5 Expert witness:	An expert witness, who may contribute feedback about learner competence based on real work activities, should have a working knowledge of the QCF units on which they are commenting, be occupationally competent in their area of expertise and have either any qualification in assessment of workplace performance or a professional work role which involves evaluating the everyday practice of staff.



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