

# Edexcel BTEC Level 4 Diploma in Public Relations (QCF)

BTEC Professional Combined Competence and  
Knowledge Qualification

## **Specification**

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Issue 2

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This specification is Issue 2. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on the Edexcel website:  
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# **BTEC Professional qualification title covered by this specification**

## **Edexcel BTEC Level 4 Diploma in Public Relations (QCF)**

This qualification has been accredited to the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website [www.education.gov.uk/](http://www.education.gov.uk/). The QCF Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The Qualification Number for the qualification in this publication is:

Edexcel BTEC Level 4 Diploma in Public Relations (QCF)                      600/5847/X

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

This qualification is accredited by Ofqual as being part of an Apprenticeship Framework – the Higher Apprenticeship in Public Relations.

# Welcome to the Edexcel BTEC Level 4 Diploma in Public Relations (QCF)

We are delighted to introduce our new qualification, which will be available for teaching from September 2012. This qualification has been developed to conform to the requirements of the Qualifications and Credit Framework (QCF).

## Focusing on the Edexcel BTEC Level 4 Diploma in Public Relations (QCF)

**The Edexcel BTEC Level 4 Diploma in Public Relations (QCF) has been approved as the combined qualification component of the Higher Apprenticeship in Public Relations.**

This qualification is a nationally recognised, combined competence and knowledge qualification. The qualification has been developed in conjunction with employers from the public relations (PR) industry to give learners flexible access, through an alternative entry, to the industry. As part of the Higher Apprenticeship Framework the qualification supports learners as it gives them career pathways for a variety of PR roles, including PR assistant, account executive/coordinator, press officer and digital communications officer job roles. This combined qualification will enable learners to apply their knowledge and skills to real business issues in the workplace.

## Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to fit easily into your programme and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

## Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related scenarios, contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require to progress within the workplace or education.

## Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and learner needs – in this case, Skills CFA and the Public Relations Consultants Association (PRCA). Many industry and professional bodies offer successful BTEC learners exemptions for their own accredited qualifications.

## **All you need to get started**

To help you get off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching this BTEC qualification. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Edexcel vocational qualifications
- information on rules of combination, qualification structure and quality assurance, so you can deliver the qualification with confidence
- explanations of the content's relationship with the learning outcomes
- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.



# Contents

<b>What are BTEC Level 4 Professional qualifications?</b>	<b>1</b>
Edexcel BTEC Level 4 Diploma	2
Key features of the Edexcel BTEC Level 4 Diploma in Public Relations (QCF)	2
<b>Rules of combination</b>	<b>3</b>
Rules of combination for the Edexcel BTEC Level 4 Diploma in Public Relations (QCF) qualification	3
Edexcel BTEC Level 4 Diploma in Public Relations (QCF)	4
<b>Assessment</b>	<b>6</b>
<b>Quality assurance of centres</b>	<b>8</b>
<b>Programme design and delivery</b>	<b>10</b>
Mode of delivery	10
Resources	10
Delivery approach	10
<b>Access and recruitment</b>	<b>11</b>
Restrictions on learner entry	11
Access arrangements and special considerations	11
<b>Unit format</b>	<b>12</b>
Unit title	12
Unit code	12
QCF level	12
Credit value	12
Guided learning hours	13
Unit aim	13
Competency unit assessment guidance	13
Unit introduction	13
Learning outcomes	13
Assessment criteria	13
Unit content	13
Guidance	14
<b>Units</b>	<b>15</b>
Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance At Work	19
Unit 2: Understanding Public Relations	29
Unit 3: Understanding the Use of the Written Word for Public Relations	37
Unit 4: Understanding the Creative Process to Generate Ideas	43
Unit 5: Understanding the Media Landscape	49
Unit 6: Understanding Public Relations Campaign Planning	57
Unit 7: Communicating Effectively in Public Relations	63
Unit 8: Pitching Public Relations Stories to the Media	69

Unit 9:	Delivering and Evaluating Public Relations Campaigns	75
Unit 10:	Delivering Professional Presentations	83
Unit 11:	Plan and Manage your Own Workload	91
Unit 12:	Researching and Analysing Data for Public Relations	99
Unit 13:	Develop Working Relationships with Colleagues and Stakeholders	105
Unit 14:	Career Development	111
Unit 15:	Understanding Public Relations Work within Public Affairs	119
Unit 16:	Understanding the Use of Public Relations in Issues and Crisis Management	127
Unit 17:	Understanding How to Win New Public Relations Business	133
Unit 18:	Understanding Client Relationships in Public Relations	139
Unit 19:	Understanding the Importance of Brands in Public Relations	145
Unit 20:	Understanding How Public Relations Professionals Contribute to Internal Communications	153
Unit 21:	Plan and Organise an Event	159
Unit 22:	Co-ordinate an Event	167
Unit 23:	Plan and Organise Meetings	173
Unit 24:	Project Management Skills	183
Unit 25:	Agree a budget	189
Unit 26:	Manage budgets	195
Unit 27:	Negotiation and Influencing	201
Unit 28:	Develop, Maintain and Review Personal Networks	207
<b>Further information</b>		<b>213</b>
<b>Useful publications</b>		<b>213</b>
	Professional body contact details	213
<b>Professional development and training</b>		<b>214</b>
<b>Annexe A</b>		<b>215</b>
	The Edexcel/BTEC qualification framework for the public relations sector	215
<b>Annexe B</b>		<b>219</b>
	Wider curriculum mapping	219
<b>Annexe C</b>		<b>221</b>
	Level 2 Functional Skills mapping	221
<b>Annexe D</b>		<b>229</b>
	Personal, learning and thinking skills mapping	229
	Summary of the PLTS coverage throughout the programme	232
<b>Annexe E</b>		<b>235</b>
	Skills CFA – Public Relations Assessment Requirements	235
<b>Annexe F</b>		<b>243</b>
	Management Standards Centre (MSC) – Assessment Strategy for Management and Leadership	243

<b>Annexe G</b>	<b>245</b>
Council for Administration (CfA) – Assessment Strategy for Business and Administration	245
<b>Annexe H</b>	<b>247</b>
Glossary of accreditation terminology	247
<b>Annexe I</b>	<b>249</b>
BTEC Specialist and Professional qualifications	249



# What are BTEC Level 4 Professional qualifications?

BTEC Professional qualifications are qualifications at level 4 to level 8 in the Qualifications and Credit Framework (QCF) and are designed to provide professional work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently, they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Professional qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC). A number of BTEC Professional qualifications are recognised as the knowledge or combined knowledge and competence components of Apprenticeships Frameworks.

On successful completion of a BTEC Professional qualification, learners can progress to or within employment and/or continue their study in the same or related vocational area.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

## **Edexcel BTEC Level 4 Diploma**

The Edexcel BTEC Level 4 Diploma offers an engaging programme for those who are clear about the vocational area they want to learn more about. There is potential for the qualification to prepare learners for employment in a particular vocational sector and it is suitable for those who have decided that they wish to enter a specific area of work.

### **Key features of the Edexcel BTEC Level 4 Diploma in Public Relations (QCF)**

The Edexcel BTEC Level 4 Diploma in Public Relations (QCF) has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- demonstrate competence in the workplace, through the competency units included in the structure
- achieve a nationally recognised, Level 4 vocationally-related qualification
- progress to employment in the public relations sector
- progress to related general and/or vocational qualifications.

# Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

## **Rules of combination for the Edexcel BTEC Level 4 Diploma in Public Relations (QCF) qualification**

When combining units for an Edexcel BTEC Level 4 Diploma in Public Relations (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to.

### **Edexcel BTEC Level 4 Diploma in Public Relations (QCF)**

- 1 Qualification credit value: a minimum of 70 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 47 credits.
- 3 All credits must be achieved from the units listed in this specification.

## Edexcel BTEC Level 4 Diploma in Public Relations (QCF)

The Edexcel BTEC Level 4 Diploma in Public Relations (QCF) is a 70-credit and 426–464 guided learning hour (GLH) qualification.

Learners must achieve a minimum of 70 credits to achieve the qualification, 58 credits from the mandatory units (Group A) plus a minimum of 12 credits from the optional units (Group B).

<b>Edexcel BTEC Level 4 Diploma in Public Relations (QCF)</b>				
<b>Unit No.</b>	<b>Unit Reference No.</b>	<b>Unit Title</b>	<b>Credit</b>	<b>Level</b>
<b>Group A – Mandatory Units</b>				
1	D/601/7644	Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance at Work	4	3
2	M/504/0884	Understanding Public Relations	4	4
3	T/504/0918	Understanding the Use of the Written Word for Public Relations	4	4
4	A/504/0919	Understanding the Creative Process to Generate Ideas	3	4
5	T/504/0921	Understanding the Media Landscape	6	4
6	A/504/0922	Understanding Public Relations Campaign Planning	5	4
7	L/504/0925	Communicating Effectively in Public Relations	5	4
8	R/504/0926	Pitching Public Relations Stories to the Media	4	4
9	Y/504/0927	Delivering and Evaluating Public Relations Campaigns	6	4
10	D/504/0928	Delivering Professional Presentations	3	3
11	D/601/2654	Plan and Manage your Own Workload	2	3
12	H/504/0929	Researching and Analysing Data for Public Relations	6	4
13	K/600/9661	Develop Working Relationships with Colleagues and Stakeholders	4	4
14	R/503/2891	Career Development	2	3

<b>Unit No.</b>	<b>Unit Reference No.</b>	<b>Unit Title</b>	<b>Credit</b>	<b>Level</b>
<b>Group B – Optional Units</b>				
15	Y/504/0930	Understanding Public Relations Work within Public Affairs	5	4
16	D/504/0931	Understanding the Use of Public Relations in Issues and Crisis Management	4	5
17	H/504/0932	Understanding How to Win New Public Relations Business	3	4
18	K/504/0933	Understanding Client Relationships in Public Relations	4	4
19	M/504/0934	Understanding the Importance of Brands in Public Relations	4	4
20	T/504/0935	Understanding How Public Relations Professionals Contribute to Internal Communications	2	3
21	R/601/2540	Plan and Organise an Event	4	3
22	Y/601/2541	Co-ordinate an Event	4	3
23	D/601/2542	Plan and Organise Meetings	5	3
24	H/502/5783	Project Management Skills	1	3
25	J/601/2552	Agree a Budget	4	3
26	T/601/2580	Manage Budgets	5	4
27	A/502/4428	Negotiation and Influencing	6	4
28	R/600/9587	Develop, Maintain and Review Personal Networks	4	4

# Assessment

The overall grade for the 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 qualification is 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 strategy/assessment requirements documents for competence based units

The assessment strategy and assessment requirements documents for the competence units in this qualification have been included in *Annexe E, Annexe F and Annexe G*. The applicable annexe for the correct document will be stated in the unit, in the assessment guidance section. These have been developed by the named SSC/B in partnership with employers, training providers, awarding organisations and the regulatory authorities. They include details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **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:

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

## Types of evidence

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.

Centres should also refer to the assessment strategy for competence based units and the assessment requirements/evidence requirements section within each individual unit.

- 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 (EWT)
- 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's appointed external examiner. A range of recording documents is available on the Edexcel website [www.edexcel.com](http://www.edexcel.com). Alternatively, centres may develop their own.

## Qualification grade

Learners who achieve the minimum eligible credit value specified by the rules of combination will achieve the qualification at pass grade.

In Edexcel BTEC Level 4 Professional qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time
- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria
- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

## Quality assurance of centres

Pearson's quality assurance system for all Edexcel BTEC higher level programmes on the QCF at levels 4–7 will ensure that centres have effective quality assurance processes in place to review programme delivery. It will also ensure that the outcomes of assessment meet national standards.

The quality assurance process for centres offering Edexcel BTEC higher level programmes on the QCF at levels 4–7 comprises three key components, as outlined below.

### 1. Approval process

Approval to offer the Edexcel BTEC Level 4 Diploma in Public Relations (QCF) will vary depending on the status of the centre.

Centres that have a recent history of delivering Edexcel BTEC qualifications at levels 4–7, and have an acceptable quality profile in relation to their delivery and assessment, will be able to gain fast track qualification approval to offer Edexcel BTEC Level 4 Diploma in Public Relations (QCF) through Edexcel Online.

Centres that do not have a recent history of delivering Edexcel BTEC qualifications at levels 4–7 (i.e. in the last four years) will be required to seek approval to offer the BTEC Level 4 Diploma in Public Relations (QCF) through the existing Edexcel qualification and centre approval process. Prior to approval being given, centres will be required to submit evidence to demonstrate that they:

- have the human and physical resources required for effective delivery and assessment
- understand the implications for independent assessment and agree to abide by these
- have a robust internal assessment system supported by 'fit for purpose' assessment documentation
- have a system to internally verify assessment decisions, to ensure standardised assessment decisions are made across all assessors and sites.

Applications have to be supported by the head of the centre (principal, chief executive etc) and include a declaration that the centre will operate the programmes strictly as approved and in line with Pearson requirements.

## **2. Monitoring of internal centre systems**

Centres will be required to demonstrate ongoing fulfilment of the centre approval criteria over time and across all programmes. The process that assures this is external examination, which is undertaken by Pearson's appointed external examiners. Centres will be given the opportunity to present evidence of the ongoing suitability and deployment of their systems to carry out the required functions. This includes the consistent application of policies affecting learner registrations, appeals, effective internal examination and standardisation processes. Where appropriate, centres may present evidence of their operation within a recognised code of practice, such as that of the Quality Assurance Agency for Higher Education. Pearson reserves the right to confirm independently that these arrangements are operating to Pearson's satisfaction.

Pearson will affirm, or not, the ongoing effectiveness of such systems. Where system failures are identified, sanctions (appropriate to the nature of the problem) will be applied to assist the centre in correcting the problem.

## **3. Independent assessment review**

The internal assessment outcomes reached for all Edexcel BTEC higher level programmes on the QCF at levels 4–7 are subject to an independent assessment review carried out by an Edexcel-appointed external examiner.

The outcomes of this process will be to:

- confirm that internal assessment is to national standards and allow certification

or

- make recommendations to improve the quality of assessment outcomes before certification is released

or

- make recommendations about the centre's ability to continue to be approved for the qualification(s) in question.

## **Additional arrangement for ALL centres**

Regardless of the type of centre, Pearson reserves the right to withdraw either qualification or centre approval when it deems there is an irreversible breakdown in the centre's ability to quality assure either its programme delivery or its assessment standards.

### **Quality assurance model for delivery of the qualification within a BTEC Higher Apprenticeship Framework**

When delivered as part of a BTEC Higher Apprenticeship, the Edexcel quality assurance model for the qualification in this specification will be:

- a twice-yearly visit from an Edexcel-appointed external examiner to sample internal verification and assessor decisions for competence-based and knowledge-based units and to review centre-wide quality assurance systems.

### **Quality assurance model for delivery of the qualification as a standalone qualification**

When delivered as a standalone qualification, the Edexcel quality assurance model for the qualification in this specification will be:

- an annual visit by an Edexcel-appointed external examiner to sample internal verification and assessor decisions for competence-based and knowledge-based units and to review centre-wide quality assurance systems

For further details, go to the UK BTEC Quality Assurance pages of the Edexcel website: <http://www.pearsonwbl.edexcel.com>

## Programme design and delivery

### Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC Level 4 to Level 8 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

### Resources

Edexcel BTEC Level 4 Professional qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential requirements* sections.

### Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC Level 4 Professional qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

# Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement 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 Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher-level qualification.

## Restrictions on learner entry

The Edexcel BTEC Level 4 Diploma in Public Relations (QCF) is accredited on the QCF for learners aged 16 and above.

## Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ 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.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website ([www.edexcel.com](http://www.edexcel.com)).

Please refer to Edexcel's Equality Policy for further details, [www.edexcel.co/policies/pages/home.aspx](http://www.edexcel.co/policies/pages/home.aspx)

## **Recognition of Prior Learning**

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

## **Unit format**

All units in Edexcel BTEC Level 4 Professional qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has 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 code**

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

### **QCF level**

All units and qualifications within the QCF will 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 National Occupational Standards (NOS) and/or other sector/professional benchmarks.

### **Credit value**

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

## **Guided learning hours**

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.

## **Unit aim**

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

## **Competency unit assessment guidance**

The unit assessment guidance will appear in the competency units only in the qualification. It sets out how the unit should be assessed.

## **Unit introduction**

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

## **Learning outcomes**

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

## **Assessment criteria**

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

## **Unit content**

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

## Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

## Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.
- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.
- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.
- Brackets contain amplification of content which must be covered in the delivery of the unit.
- 'e.g.' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

## Guidance

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Links to other BTEC units* – suggests other units in the qualification that the unit could link with for delivery and/or assessment purposes. This is not exhaustive, and is not intended to rule out alternative links.
- *Essential requirements* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Edexcel to offer the qualification.
- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria. For the competency units this section will also detail the Annexe for the Assessment Strategy/Assessment Requirements document applicable for the unit, which must be followed
- *Resources* – gives a list of learner resource material that benchmarks the level of study.

# Units



# Units

Unit 1:	Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance At Work	19
Unit 2:	Understanding Public Relations	29
Unit 3:	Understanding the Use of the Written Word for Public Relations	37
Unit 4:	Understanding the Creative Process to Generate Ideas	43
Unit 5:	Understanding the Media Landscape	49
Unit 6:	Understanding Public Relations Campaign Planning	57
Unit 7:	Communicating Effectively in Public Relations	63
Unit 8:	Pitching Public Relations Stories to the Media	69
Unit 9:	Delivering and Evaluating Public Relations Campaigns	75
Unit 10:	Delivering Professional Presentations	83
Unit 11:	Plan and Manage your Own Workload	91
Unit 12:	Researching and Analysing Data for Public Relations	99
Unit 13:	Develop Working Relationships with Colleagues and Stakeholders	105
Unit 14:	Career Development	111
Unit 15:	Understanding Public Relations Work within Public Affairs	119
Unit 16:	Understanding the Use of Public Relations in Issues and Crisis Management	127
Unit 17:	Understanding How to Win New Public Relations Business	133
Unit 18:	Understanding Client Relationships in Public Relations	139
Unit 19:	Understanding the Importance of Brands in Public Relations	145
Unit 20:	Understanding How Public Relations Professionals Contribute to Internal Communications	153
Unit 21:	Plan and Organise an Event	159
Unit 22:	Co-ordinate an Event	167
Unit 23:	Plan and Organise Meetings	173
Unit 24:	Project Management Skills	183
Unit 25:	Agree a budget	189
Unit 26:	Manage budgets	195
Unit 27:	Negotiation and Influencing	201
Unit 28:	Develop, Maintain and Review Personal Networks	207



# **Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance At Work**

Unit code: D/601/7644  
QCF Level 3: BTEC Professional  
Credit value: 4  
Guided learning hours: 32

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## **Unit aim**

This unit is about understanding one's own responsibilities for action in a business environment, including legislative and contractual responsibilities and ways of managing and evaluating own work effectively.

## **Unit introduction**

A successful career in public relations (PR) is underpinned by strong abilities in taking personal responsibility, self-evaluation and skills development. Teamwork and communication are at the centre of most PR environments and this unit concentrates on the learner's impact on their own PR career and workplace environments.

Learners will cover the principles of employment legislation and rights, employee support and information resources, and will develop an understanding of how to utilise and support each element through personal workplace conduct. The unit also helps learners to identify decision-making strategies for planning their own work, the importance of consistent communication, methods to define performance measurement criteria, and productive ideas for managing workplace pressure and dealing with problems.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the employment rights and responsibilities of the employee and employer and their purpose</p>	<p>1.1 Identify the main points of contracts of employment and their purpose</p> <p>1.2 Outline the main points of legislation affecting employers and employees and their purpose, including anti-discrimination and entitlement legislation</p> <p>1.3 Identify where to find information on employment rights and responsibilities both internally and externally</p> <p>1.4 Explain the purpose and functions of representative bodies that support employees</p> <p>1.5 Explain employer and employee responsibilities for equality and diversity in a business environment</p> <p>1.6 Explain the benefits of making sure equality and diversity procedures are followed in a business environment</p>
<p>2 Understand the purpose of health, safety and security procedures in a business environment</p>	<p>2.1 Explain employer and employee responsibilities for health, safety and security in a business environment</p> <p>2.2 Explain the purpose of following health, safety and security procedures in a business environment</p>
<p>3 Understand how to manage own work</p>	<p>3.1 Explain the reasons for planning and prioritising own work</p> <p>3.2 Identify ways of planning and prioritising own work</p> <p>3.3 Explain the purpose of keeping other people informed about progress</p> <p>3.4 Describe methods of dealing with pressure in a business environment</p>

<b>Learning outcomes</b>	<b>Assessment criteria</b>
<p>4 Understand how to evaluate and improve own performance in a business environment</p>	<p>4.1 Explain the purpose of continuously evaluating and improving own performance in a business environment</p> <p>4.2 Describe ways of evaluating and improving own performance in a business environment</p> <p>4.3 Explain the purpose of encouraging and accepting feedback from others</p> <p>4.4 Explain different types of career pathways and roles available</p>
<p>5 Understand the types of problems that may occur with own work and how to deal with them</p>	<p>5.1 Describe the types of problems that may occur with own work</p> <p>5.2 Explain ways of dealing with problems that may occur with own work</p> <p>5.3 Explain how and when to refer problems to relevant colleagues</p>
<p>6 Understand the decision making process</p>	<p>6.1 Explain key stages in the decision-making process</p> <p>6.2 Explain the purpose of not exceeding own limits of authority in making decisions</p>

## Unit content

### 1 Understand the employment rights and responsibilities of the employee and employer and their purpose

*Key points and purpose of employment contracts:* types of contracts, e.g. fixed-term, secondment, agency, casual, permanent; purpose of contracts, e.g. define job description, start date, disciplinary and grievance procedures, payment terms, holiday entitlement, pension schemes, workplace and staff rules; protection against unfair dismissal

*Key points and purpose of employment legislation:* equality legislation, e.g. protected characteristics (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation); employer conduct, e.g. terminology, accessibility, reasonable adjustments; employee entitlement legislation, e.g. working time directive, parental rights, sick pay, flexible working, jury service, access to medical reports, rights in insolvency, National Insurance payments, right to privacy, anti-harassment; employee liability legislation, e.g. confidentiality, patents, inventions and copyright, moonlighting, disclosure, faithful service, lawfulness, giving notice; ex-employee liability, e.g. trade secrets, customers and contacts, competitors, 'garden leave'

*Employment rights resources:* internal, e.g. employee handbook, human resources; external, e.g. trade unions, Citizens Advice Bureau (CAB), Directgov, Advisory, Conciliation and Arbitration Service (ACAS)

*Purpose and function of employee support bodies:* trade unions, e.g. bargaining, industrial negotiation, industrial action, employee mediation, tribunal representation; legislation and employee support bodies, e.g. trade union rights legislation, European employment councils, Citizens Advice Bureau (CAB), Jobcentre; purpose of support bodies, e.g. advice, employment tribunals

*Employer and employee responsibilities:* liability and conduct of employers, e.g. employment adverts, interview conduct, equal pay, National Minimum Wage, 'normal' working hours, giving notice; adherence to workplace policies, e.g. equal opportunities, privacy, bullying and harassment, code of conduct (workplace defined, profession-orientated); copyright adherence, e.g. photographs, written copy, graphics, audio, film and video, author credit; regulatory schemes, e.g. Newspaper Licensing Agreements (NLAs), Advertising Standards Authority (ASA)

*Benefits of following equality and diversity procedures:* equal pay for equal responsibilities; equal recruitment practices; training and development; varied staff backgrounds and experience; team building; supportive work environment

### 2 Understand the purpose of health, safety and security procedures in a business environment

*Responsibilities:* employer and employee adherence to legislation, e.g. health and safety, EU law, data protection; employer provision, e.g. safety representatives, first aid, sanitary facilities, employee assistance; workplace policies, e.g. health and safety policy and regulations, occupational health, bullying and harassment, mediation, drug and alcohol; employee responsibilities, e.g. reasonable care, proper use of equipment, cooperation with employer, security vigilance

*Purpose:* stress awareness; health, safety and personal welfare at work; protection of personal data; protection of property and equipment; prevent injuries and illness to self or others; reduce sickness leave; maintain workplace productivity and performance targets; identify key people, e.g. occupational health adviser, security staff; reduce risks and hazards; improve working practices

### 3 Understand how to manage own work

*Reasons for planning and prioritising own work:* accountability; work impact on colleagues and clients; clarity, e.g. urgency of tasks, key project stakeholders, relevant task owners, contractors, media contacts, audience; definitions, e.g. objectives, success criteria (event attendance, online sales, news response)

*Ways of planning and prioritising own work:* key identification, e.g. company targets, goals, consistent plans, decision making, execution, signposting, monitoring, review; project management theories and software, e.g. Gantt chart, Excel spreadsheets, Pareto Principle; approach, e.g. work backwards from clients, define success criteria prior to campaign; measurement, e.g. website tracking (new release response, campaign effectiveness, sales), surveys (pre-campaign, post-campaign); keeping diaries; calendar alerts

*Purpose of keeping others informed:* impact of your work, e.g. on colleagues, relevant tasks, project deadlines; awareness, e.g. of ultimate project, goals, own tasks within larger project; crisis control; deadline and change monitoring; customer service, e.g. client progress reports, value for money, word-of-mouth

*Dealing with pressure:* self-management, e.g. time-management, seek information efficiently, task delegation, assertive communication, managing interruptions, deadline management or renegotiation, self-expectation management; recognising stress in self or others; asking for help, e.g. line manager, HR, external help; negotiating change, e.g. deadlines, office politics, customer service policy, responsibilities

### 4 Understand how to evaluate and improve own performance in a business environment

*Purpose of continuous self-evaluation:* improvement, e.g. time management, deadlines and prioritisation, sensitivity, ability to learn, self-confidence, motivation, morale; assessment, e.g. skills, progress, ability to meet defined criteria; identification, e.g. goals, effort, achievement

*Ways of evaluating and improving:* encouraging feedback; communication (with colleagues, clients, audience, contractors); define realistic success criteria; identify reasonable goals; develop accessible action plans; 360 feedback, e.g. understand own workplace competencies as perceived by colleagues

*Purpose and encouragement of feedback:* improvement (skills, customer service, planning, coordination); identifying problems (before they arise, for correction next time); aims, e.g. specific, honest; colleagues and line manager (meetings, group discussion, one to one, formal, informal, observation); encouraging feedback, e.g. being open, listening

*Careers:* typical PR pathways, e.g. junior account executive, account executive, account manager, account director; career entry points, e.g. apprenticeship, education, work placement, shadowing, voluntary, maternity or illness cover; roles, e.g. events (planning, coordinating), communications (press, copywriting, online, internal), media relations (radio, television, journalists), fund-raising, public affairs (lobbying, legislation, politics); types, e.g. consultancy, in-house, agency; sectors, e.g. charity, business to business, public, private, entertainment, media, financial

## **5 Understand the types of problems that may occur with own work and how to deal with them**

*Types of problems:* undesired results following plans, e.g. events attendance, complaints, crisis, publicity (negative publicity, competitor in spotlight), deadline delays; unforeseen complications, e.g. emergencies, travel chaos, IT or equipment failures, event venue issues, contractor failure; communication failure; poor performance; errors

*Dealing with problems:* requesting help; understanding performance expectations and goals; planning, e.g. facts, process, outcome, emergency planning; refocusing, e.g. goals, deadlines, multiple priorities, support required; referring to company procedures; taking responsibility, e.g. ownership of problem, timeliness, asking questions, feedback skills, self-assessment; identifying impacting factors for future planning, e.g. time, resources

*How to refer problems:* recognising severity of problem; identifying relevant colleagues and contacts; concise communication, e.g. facts based, policy based, suggested solutions, projected outcome

*When to refer problems:* problem exceeds ability, experience, training or authorisation; to avert crisis; to avoid missing deadlines

## **6 Understand the decision making process**

*Key stages:* identification, e.g. problem, anticipated outcome, priorities, complexity, risk; collect key data, e.g. company or project hierarchy, stakeholders, deadlines, resources, budget; initiation, e.g. ideas, options, alternatives; implementation; evaluation

*Purpose of not exceeding own authority:* balancing company strategy and personal aims; chain-of-command; shared decision making; timing

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 11: Plan and Manage Your Own Workload	Unit 7: Communicating Effectively in Public Relations Unit 13: Develop Working Relationships with Colleagues and Stakeholders Unit 17: Understanding How to Win New Public Relations Business Unit 18: Understanding Client Relationships in Public Relations Unit 20: Understanding How Public Relations Professionals Contribute to Internal Communications Unit 26: Manage Budgets Unit 27: Negotiation and Influencing Unit 28: Develop, Maintain and Review Personal Networks	Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This unit focuses on the learner's impact on their own career and their potential workplace environments. Employment issues, from legislation through to learner self-evaluation, are included in the unit. A consolidated delivery approach is recommended in order to cover the unit content effectively in the available timeframe. As with any unit that covers learner self-analysis, a sensitive and confidential approach is crucial.

Learning outcomes 1 and 2 could be delivered simultaneously through in-class resource reviews – for example, legislation and employee support websites – followed by group discussions or role-play scenarios. Learners could benefit from a visiting employment law representative, for example a human resources manager or union representative, to discuss the key points of employment law, equality and diversity legislation, health and safety law, employee support resources, and employer and employee responsibilities in upholding relevant legislation through personal conduct. Learners could participate in mock interviews, as both interviewer and interviewee, with close tutor observation and input.

For learning outcome 3, input from PR professionals is recommended to help tutors and learners understand the importance of planning and prioritising one's own work in a PR workplace context. A PR practitioner could be useful in conveying the concepts of teamwork and communication as the underpinning elements of any PR environment. This would help learners understand the importance of planning and prioritising their own work, of communicating with colleagues, and their potential impact on an overall PR campaign. This element could be delivered either as part of the classroom visit, or in a group follow-up consultation via email or telephone. However, it is recommended that 'teamwork and communication' are delivered at the beginning of learning outcome 3. Delivery of this part of the unit could be coordinated with the underpinning knowledge elements of *Unit 11: Plan and Manage Your Own Workload*, which will give learners opportunities to put theory into practice. To introduce learners to an example of a practical project management tool, tutors could provide an overview of the Gantt chart. Learners could participate in a Gantt chart exercise within small groups, using sticky notes to build a sample chart in-class. Tutors could also introduce the concept of the Pareto Principle, which would give learners a simple time management reference as they develop their understanding of personal performance evaluation. The Gantt chart exercise and/or Pareto principle overview do not need to be assessed, but could be useful in helping learners to think practically about their own work planning. To cover elements of methods for dealing with workplace challenges and pressure, an honest but broad discussion of typical problems that can arise in PR could also be included in the PR practitioner input.

Learners could make individual lists of ideas for planning/prioritising their own work, and for dealing with pressure. A group discussion of each list could generate idea sharing. Following idea sharing, learners could then develop their own final list of planning and coping methods.

Learning outcome 4 could benefit from an initial idea-sharing group discussion of how to evaluate and improve performance, perhaps involving question and answer sessions or role-play scenarios. Learners could keep a record of the sessions and role-play for a follow-up group discussion. Learners may also benefit from being supported through 360° reporting to enable them to receive anonymous feedback from their colleagues and line manager. Learners could also participate in giving feedback to their colleagues and line manager using this system to develop a fuller understanding of its process and benefits. Sample 360° reporting forms are available online.

Learning outcomes 5 and 6 are closely linked and would benefit from an overview of learning outcome 5 at the beginning so learners understand the importance of effective decision making when dealing with problems. A group brainstorming session could generate a list of problems learners could potentially encounter with their own PR work. Learners could agree a list of key problems to address, such as communication failures, missing a deadline or poor performance, to encourage the identification of relevant solutions.

To achieve learning outcome 6, tutors could give learners a set of decision-making criteria, to include the key stages of decision making and typical chains-of-command in a PR workplace. Tutors could engage learners in individual 'what if' scenarios to enable them to practise decision making in a simulated workplace setting. Input from PR professionals is recommended.

## Assessment

Learning outcomes 1 and 2 can be assessed through evidence of learners participating in discussions and role-play scenarios. If the interview role-play scenario is used, learners should keep a record of their role as both the interviewer and interviewee. This record should be submitted to the tutor as evidence of participation. As a final element to assessing learning outcomes 1 and 2, learners could answer a multiple-choice questionnaire to demonstrate their understanding of the key points of employment law, equality and diversity legislation, health and safety law, employee support resources, and the employer and employee responsibilities of upholding relevant legislation through personal conduct.

Learning outcomes 3 to 6 can be assessed using a variety of techniques, with learners linking the assessment criteria evidence to their own workplace examples. Learners could develop an individual list of ideas for planning and prioritising their own work. The list should include sufficient detail to demonstrate that they understand the importance of self-management in a PR business context. Learners may submit their records of group question and answer sessions (and feedback if applicable). Learners can analyse how giving and receiving feedback supports them in improving their own performance in the PR workplace. Learners should include evidence of identifying key problems, understanding key problem-solving methods and developing relevant solutions. The evidence should include problem-assisting contacts, decision-making strategies (within the learner's range of skills), and/or proposed actions when a decision exceeds their authority. Evidence must also demonstrate the relevant use of resources.

## Resources

### Books

Adair J – *Decision Making and Problem Solving Strategies* (Kogan Page, 2010)  
ISBN: 978-0749455514

Richardson N and Laville L – *Develop Your PR Skills* (Kogan Page, 2010)  
ISBN: 978-0749459703

### Websites

<a href="http://www.acas.org.uk">www.acas.org.uk</a>	Advisory, Conciliation and Arbitration Service (ACAS)
<a href="http://www.asa.org.uk">www.asa.org.uk</a>	Advertising Standards Authority (ASA)
<a href="http://www.cdl.org/resource-library/articles/self_eval.php">www.cdl.org/resource-library/articles/self_eval.php</a>	Center for Development and Learning (US website providing self-evaluation model)
<a href="http://www.cipr.co.uk">www.cipr.co.uk</a>	Chartered Institute of Public Relations (CIPR)

<a href="http://www.cipr.co.uk/content/about-us/about-cipr/code-conduct">www.cipr.co.uk/content/about-us/about-cipr/code-conduct</a>	CIPR Code of Conduct
<a href="http://www.citizensadvice.org.uk">www.citizensadvice.org.uk</a>	Citizens Advice Bureau (CAB)
<a href="http://www.direct.gov.uk">www.direct.gov.uk</a>	Directgov
<a href="http://www.ganttchart.com">www.ganttchart.com</a>	Gantt Chart (project management)
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive (HSE)
<a href="http://www.legislation.gov.uk/ukpga/1996/18/contents">www.legislation.gov.uk/ukpga/1996/18/contents</a>	Employment rights legislation
<a href="http://www.ipra.org">www.ipra.org</a>	International Public Relations Association (IPRA)
<a href="http://www.nla.co.uk">www.nla.co.uk</a>	Newspaper Licensing Agency (NLA)
<a href="http://www.prca.org.uk">www.prca.org.uk</a>	Public Relations Consultants Association (PRCA)
<a href="http://www.prca.org.uk/assets/files/AboutUs/Files/PRCA_Codes_of_conduct_and_Professional_charter.pdf">www.prca.org.uk/assets/files/AboutUs/Files/PRCA_Codes_of_conduct_and_Professional_charter.pdf</a>	PRCA Code of Conduct
<a href="http://www.projectsart.co.uk/pareto-principle.html">www.projectsart.co.uk/pareto-principle.html</a>	Pareto Principle (time management theory)
<a href="http://www.shinefeedback.biz/docs/Shine%20Sample%20Report.pdf">http://www.shinefeedback.biz/docs/Shine%20Sample%20Report.pdf</a>	Sample 360° feedback form
<a href="http://www.tuc.org.uk">www.tuc.org.uk</a>	Trades Union Congress

## **Unit 2: Understanding Public Relations**

Unit code:	M/504/0884
QCF Level 4:	BTEC Professional
Credit value:	4
Guided learning hours:	20

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### **Unit aim**

This unit provides the learner with an understanding of the public relations industry and the work undertaken by public relations professionals.

### **Unit introduction**

It is important for new entrants to the public relations industry to have a clear grasp of the role that the industry plays in contemporary business and public life. This unit is a background to all the other units in the programme and also the foundation of ongoing understanding of the rapidly changing role of public relations.

In this unit, learners will consider the different definitions of public relations and its relationship to corporate communications and marketing.

Learners will cover the types of activities public relations professionals undertake and the different types of organisations in which they work, giving them an understanding of the size and structure of the industry as a whole and current employment trends.

Learners will also learn about the tactics used in traditional public relations as well as newer tactics adopted in the areas of digital communications and social media.

An important part of the unit is the aspect of constraints, both legal and ethical.

This unit is knowledge based and learning is likely to be developed from a wide range of sources.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the purpose of public relations</p>	<p>1.1 Compare how different organisations define public relations</p> <p>1.2 Explain the links and differences between advertising, marketing and public relations</p> <p>1.3 Explain how public relations professionals affect the success of businesses</p> <p>1.4 Describe the range of different public relations specialisms</p> <p>1.5 Explain the impact of legal constraints on public relations activities</p> <p>1.6 Assess key tactics used in public relations</p>
<p>2 Understand the current nature of the public relations industry</p>	<p>2.1 Analyse the importance of the public relations industry to the global and national economy</p> <p>2.2 Discuss the current structure of the public relations industry</p> <p>2.3 Describe the job roles of public relations professionals for different organisational structures</p> <p>2.4 Assess industry trends in public relations for current and future opportunities</p>
<p>3 Understand the importance of ethics in the public relations industry</p>	<p>3.1 Analyse ethical dilemmas faced in the public relations industry</p> <p>3.2 Assess the importance of ethical behaviour in public relations</p> <p>3.3 Assess the purpose of an ethical business code for public relations</p>

## Unit content

### 1 Understand the purpose of public relations

*Public relations origins:* definitions of public relations, e.g. professional bodies including Chartered Institute of Public Relations (CIPR) and Public Relations Society of America (PRSA); development of public relations, e.g. from wartime propaganda, from influencing public opinion during the Depression

*Public relations links:* relationship with corporate communications and marketing, e.g. how public relations fits into and alongside advertising, sales and marketing; relationship with journalism; relationship with public affairs; relationship with internal communications

*Importance of industry:* importance of public relations function to businesses, e.g. to overall company or agency success; commercial relationships

*Public relations specialisms:* e.g. branding, crisis management, event planning, public affairs, media relations strategy planning, reputation management, stakeholder management, lobbying, corporate social responsibility (CSR), issues management, internal communications, external communications

*Legal constraints:* contract law; intellectual property rights; defamation law; libel law; data protection; privacy law; bribery law; other, e.g. Financial Services Authority (FSA) regulations, advertising regulations

*Key tactics used in public relations:* events, e.g. familiarisation (fam) trips, desktop tours, new product launches; media relations, e.g. press office functions, press releases, press briefings, surveys, photography, features, background briefing, fielding spokespeople; sponsorship; special promotions including competitions and advertorials; digital public relations practice, e.g. placing content, website monitoring, attracting traffic, meta-tagging, harnessing advocacy, maintaining social media site presence, managing and monitoring viral messaging

### 2 Understand the current nature of the public relations industry

*Public relations industry:* size of industry; economic contribution, e.g. national, international, Gross Domestic Product (GDP); structure of industry (in-house teams, agencies, public sector, charities, government, integrated communications); PR consultancy operation (internal, external), e.g. reasons to bring in specialist agency for project work, process for selecting and commissioning agency work, project contracts and ongoing contracts; different ownership of public relations agencies; diversity of sectors, e.g. consumer (B2C), business to business (B2B), financial, public affairs, fashion, pharmaceutical, sport, technology

*Public relations job roles:* roles of public relations professionals, e.g. different job titles, responsibilities at different levels, interaction between different levels; roles within different sectors, e.g. in-house, integrated communications agencies, large and small agencies

*Public relations industry trends:* areas of growth and decline; current trends, e.g. search engine optimisation (SEO), online public relations; employment trends, e.g. numbers employed, types of employment (freelance, employed)

### 3 Understand the importance of ethics in the public relations industry

*Professional ethics in public relations:* definitions of ethics and morality; personal values and principles, e.g. honesty, accuracy, judiciousness, responsiveness, respect; legal responsibilities; professional body codes of conduct, e.g. Public Relations Consultants Association (PRCA), Chartered Institute of Public Relations (CIPR), Guild of Public Relations Practitioners; importance to public relations industry, e.g. trust, reputation, social responsibility, conflict resolution, commercial impact; duties and responsibilities, e.g. to self, organisation, clients, profession, society; whistleblowing; dealing with the media

*Ethical dilemmas:* e.g. personal relationships, preferential treatment, hospitality, payments to journalists, respecting intellectual property of suppliers, exploiting the media, difference between gloss and spin, decision-making processes

*Ethical constraints:* confidentiality; conflict of interest; personal conflicts

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with all the other units in the qualification.

### Essential requirements

There are no special resources needed for this unit.

### Delivery

As this unit is an overview of the public relations industry as a whole, delivery should be off-the-job. This can be either through traditional delivery to a group of learners or through the use of learning materials with appropriate opportunities for learners to discuss and interact with others. Learners would benefit from contact with public relations professionals who have a range of experiences from across the industry. Learners should seek to gain a broad view of the industry and an understanding of public relations in the wider context. Peer engagement with other learners and colleagues in different agencies and in-house teams will be important. Learners working in large consultancies should try to spend time in different departments, and all learners should attend events organised for the sector, such as PRCA or CIPR regional events.

Learning outcome 1 starts with exploring different definitions of public relations and the differences from, and relationship with, advertising, sales and marketing. Learners will find there are various interpretations and definitions and there may be no right or wrong answers, so a tutor-led debate would be an appropriate way of exploring different ideas. For other aspects of the learning outcome learners could each be given different public relations activities, for example 'crisis management' or 'lobbying', to research and then share their findings about one organisation's activities and tactics in that area and the impact of public relations on the business. A systematic approach, with use of case studies, is recommended for the section on legal constraints.

Learners could undertake their own research for learning outcome 2. As new entrants to the public relations industry this will be key information which should be of direct interest as learners build their career plans.

For learning outcome 3, selected case studies could be used to illustrate how failure to follow ethical guidelines can backfire and damage an organisation's reputation. Resources from the professional institutes provide useful and up-to-date guidance and codes of practice, and these could be used as a basis for learners to evaluate whether their own organisations are adhering to best practice guidelines.

Learners need to analyse and assess to pass the assessment criteria and attention should be given to developing these skills through the activities in the learning programme.

## Assessment

It is likely that several assignments would be used for this unit rather than one large assignment. Assessment methods could include written assignments, presentations and professional discussions. Where oral assessment is used, evidence could be collected through recordings or in the form of a detailed observation record which should be supported by evidence such as the learner's notes or visual aids.

For learning outcome 1, learners need to demonstrate an understanding of the role of public relations across the whole industry, and this should be illustrated by the use of a suitable range of examples.

For learning outcome 2, learners should again include the whole industry rather than focusing entirely on the sector or specialism in which they work. This outcome could inform learner work for Unit 14: Career Development.

In learning outcome 3, learners should fully analyse and assess as required by the assessment criteria. Learners should demonstrate the ability to see issues from different points of view, research and weigh up evidence from different sources and draw their discussions together into reasoned conclusions.

## Resources

### Books

Bussey C – *Brilliant PR* (Prentice Hall, 2011) ISBN 978-027374658

Morris T and Goldworthy S – *PR Today* (Palgrave Macmillan, 2012)  
ISBN 978-0230240094

Theaker A – *The Public Relations Handbook (Media Practice)* (4th edition)  
(Routledge, 2011) ISBN 978-0415598149

Wilcox D and Cameron G – *Public Relations: Strategies and Tactics* (10th edition)  
(Pearson, 2011) ISBN 978-0205099160

### Other publications

*CIPR Best Practice for Intellectual Property Rights* (CIPR, 2011)

*PRWeek 2011 PR Census* (Haymarket Business Media)

### Websites

<a href="http://www.cipr.co.uk">www.cipr.co.uk</a>	Chartered Institute of Public Relations
<a href="http://www.corpcommsmagazine.co.uk">www.corpcommsmagazine.co.uk</a>	<i>Corp Comms</i>
<a href="http://www.gorkana.com">www.gorkana.com</a>	Gorkana
<a href="http://www.marketingweek.co.uk/disciplines/pr/">www.marketingweek.co.uk/disciplines/pr/</a>	<i>Marketing Week</i> – PR trends
<a href="http://www.prca.org.uk">www.prca.org.uk</a>	Public Relations Consultants Association
<a href="http://www.prmoment.com">www.prmoment.com</a>	PR Moment
<a href="http://www.prnewswire.com">www.prnewswire.com</a>	PR Newswire
<a href="http://www.prsa.org">www.prsa.org</a>	Public Relations Society of America

[www.prweek.com](http://www.prweek.com)

*PRWeek*

[www.wipo.int](http://www.wipo.int)

World Intellectual Property Organisation



## **Unit 3: Understanding the Use of the Written Word for Public Relations**

Unit code:	T/504/0918
QCF Level 4:	BTEC Professional
Credit value:	4
Guided learning hours:	30

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### **Unit aim**

This unit provides the learner with an understanding of the importance of the written word to the public relations profession.

### **Unit introduction**

The written word is the cornerstone of the public relations industry. It is the primary method of communication used to ensure that public relations professionals get their message across. It is imperative that public relations practitioners who produce written communications, such as news or press releases, activity reports or presentations, are able to write properly.

Learners will cover the uses of different types of written communication produced by public relations professionals. They will study commonly-used English grammar and punctuation and the different writing styles required for different types of written communication used within public relations.

Finally, learners will cover the editing and proofreading of written communications to ensure they meet the standards required by the public relations industry.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the importance of written communications produced by public relations professionals</p>	<p>1.1 Evaluate the uses of different types of written public relations communications for an organisation</p> <p>1.2 Select appropriate types of written communication for different public relations scenarios, justifying the choice</p> <p>1.3 Analyse the impact of inaccurate or poor written communications on a public relations business</p>
<p>2 Understand why different writing styles are used by public relations professionals</p>	<p>2.1 Explain why public relations professionals use different writing styles for different public relations scenarios</p> <p>2.2 Evaluate how appropriate different writing styles are for different public relations scenarios</p> <p>2.3 Select styles of written communication for different public relations scenarios, justifying the choice</p>
<p>3 Be able to edit and proofread written communications to meet the standards required by public relations organisations</p>	<p>3.1 Edit written public relations communications to meet a specified professional standard</p> <p>3.2 Proofread written public relations communications to meet a specified professional standard</p>

## Unit content

### 1 Understand the importance of written communications produced by public relations professionals

*Written communications:* types of written public relations output, e.g. news releases, briefing documents, précis writing, feature articles, public addresses, web copy, newsletter copy, white papers, reports; reasons for having different types; uses of different types of written public relations communication

*Reasons for accuracy:* organisational and personal reputation; credibility; honesty; legal requirements; clarity of message; correct use of punctuation marks (commas, colons, semi-colons, dashes, apostrophes, quotation marks); correct grammar (verb agreement, plurals, accurate spelling, consistent voice, word order, capitalisation, sentence and paragraph construction and development); variations of grammar, e.g. US English

### 2 Understand why different writing styles are used by public relations professionals

*Different writing styles:* types and their uses in written public relations communication, e.g. journalistic, technical, online, marketing-based, client facing; advantages and disadvantages of passive and active voice; meeting different audience needs; tone of voice; clarity of message; use of concise and effective writing; use or non-use of jargon

### 3 Be able to edit and proofread written communications to meet the standards required by public relations organisations

*Editing process:* role of editors and copy-editors; checking accuracy of facts; checking consistency of style, tense and person; check writing meets organisational objectives; check writing meets the requirements of the audience, e.g. length, style, format; check for omissions; remove extraneous information and words; check house style; use of editing marks

*Proofreading:* checking final copies (spelling, punctuation, grammar, length of communication); use of proofreading marks

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 10: Delivering Professional Presentations Unit 13: Develop Working Relationships with Colleagues and Stakeholders	Unit 2: Understanding Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 5: Understanding the Media Landscape Unit 6: Understanding Public Relations Campaign Planning Unit 7: Communicating Effectively in Public Relations Unit 8: Pitching Public Relations Stories to the Media Unit 9: Delivering and Evaluating Public Relations Campaigns Unit 12: Researching and Analysing Data for Public Relations Unit 19: Understanding the Importance of Brands in Public Relations Unit 27: Negotiation and Influencing	Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to meet all the learning outcomes in the unit. For example, lectures, seminars, workshops, presentations, site visits, project work, practical exercises, research using the internet and/or library resources, and the use of personal and/or industrial experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as public relations professionals.

Learning outcome 1 could be delivered using real-life case studies. It could be combined, in part, with delivery of *Unit 2: Understanding Public Relations*. It is suggested that a public relations professional is invited to talk to learners about the different types of writing required in the industry and to, importantly, answer learner questions. Learners should prepare a range of pertinent questions in advance of such a talk.

For learning outcome 1, it is important that tutors provide a theoretical background to the correct and consistent use of grammar and punctuation and to the variations found between UK and US English. Delivery should be as interactive as possible with learners using real-life examples and case studies.

For learning outcome 2, it is important that tutors give a general overview of the different writing styles that public relations professionals could use depending on the work that they have to do. It is suggested that tutors, in particular, stress the requirements for news or press releases and other media relations outputs. It may be useful to give examples of online/newspaper style books, for example those employed by daily or Sunday newspapers and/or the BBC. It is suggested that a public relations professional is invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should prepare a range of pertinent questions in advance of such a talk.

For learning outcome 3, tutors could cover the theory of editing, sub-editing and proofreading using as much real-life case study material as possible. It is suggested that a sub-editor is invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should prepare a range of pertinent questions in advance of such talks.

## Assessment

Assessment needs to be based on carefully selected and well-developed real-life case studies. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where it is appropriate.

For learning outcome 1, learners must evaluate the uses of the major types of written public relations communication, giving their advantages and disadvantages. They should include adequate examples which show an in-depth understanding. Learners must also select and justify appropriate types of written communication for given public relations scenarios. These must be agreed with the tutor in advance or given by the tutor to the learner. However, they must relate to current issues.

Learners must analyse the impact of inaccurate or poor written communication, explaining why public relations written communications require accurate English grammar and, using examples, the reasons why accurate punctuation is important. Through their evidence learners must show a broad and in-depth understanding of the requirements.

For learning outcome 2, learners must explain the purpose of written communications in public relations and discuss the advantages and disadvantages of different writing styles for public relations professionals. Learners must show a broad and in-depth understanding of the topics, using current issues as examples where appropriate.

For learning outcome 3, learners must edit and proofread given public relations written communications to meet a specified professional standard. This standard may be related directly to the organisation the learner works for. This must be agreed with the tutor in advance or given by the tutor to the learner. Learners must show consistent accuracy in their ability to edit and proofread.

## **Resources**

### **Books**

Field M – *Improve Your Punctuation and Grammar: Master the Essentials of the English Language and Write with Greater Confidence* (How to Books Ltd, 2009)  
ISBN 978-1845283292

Field M – *Improve Your Written English: Master the Essentials of Grammar, Punctuation and Spelling and Write with Confidence* (How to Books Ltd, 2009)  
ISBN 1845283315

Foster J – *Effective Writing Skills for Public Relations* (Kogan Page, 2008)  
ISBN 978-0749451097

# **Unit 4: Understanding the Creative Process to Generate Ideas**

Unit code: A/504/0919  
QCF Level 4: BTEC Professional  
Credit value: 3  
Guided learning hours: 22

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## **Unit aim**

This unit provides the learner with an understanding of how creativity is fostered and used within a specific industry.

## **Unit introduction**

Creative ideas are intrinsic to public relations work, whether in pitching for business, developing news stories to capture the interest of a target audience, or rapidly limiting damage to the reputation of a business in a crisis situation.

In this unit learners will consider the importance of creativity in the public relations industry before exploring some theorist views as to why individuals are creative.

Learners will use this knowledge to learn how to foster creativity in themselves and others through using tools and techniques such as brainstorming and lateral thinking.

Finally, learners will find out how to ensure that the best ideas are selected for further development through the appropriate use of evaluation techniques.

This is a knowledge-based unit during which learners will integrate their experience from their work roles with theory and principles of good practice they have learned.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand the importance of creative solutions for a specific industry</p>	<p>1.1 Assess the importance of creativity in a specific industry</p> <p>1.2 Analyse key theoretical concepts about creativity in individuals</p> <p>1.3 Explain current social influences on creativity</p>
<p>2 Understand how to use creative techniques to generate ideas for given challenges</p>	<p>2.1 Evaluate the extent to which different meeting arrangements enhance creativity</p> <p>2.2 Discuss the use of techniques to generate and document ideas to different challenges</p> <p>2.3 Evaluate the effectiveness of a brainstorming session in generating ideas</p> <p>2.4 Assess how creative ideas are evaluated for implementation</p>

## Unit content

### 1 Understand the importance of creative solutions for a specific industry

*Importance of creativity to the public relations industry:* e.g. developing copy and images, responding to a pitch, pitching for new business, persuading internal or external clients, finding ways of enhancing reputations of clients, problem solving, generating new ideas to engage audience

*Key theoretical concepts:* physiological (brain hemisphere specialisation – left brain, right brain); cognitive (role of intelligence, multiple intelligences); psychological, e.g. Six Hats Thinking System (Edward de Bono), personality traits for innovation

*Social influences on creativity:* factors, e.g. stress, culture, groups, confidence, experience

*Stimulation of creative ideas:* e.g. ongoing media scanning/awareness, keeping clippings or links to items of interest, discussions

### 2 Understand how to use creative techniques to generate ideas for given challenges

*Organisation of meetings to develop ideas:* timing; numbers; environment; selecting participants; documentation of ideas

*Brainstorming:* Alex Osborn definition; rules (no criticism of ideas, all views have equal weight, quantity over quality of ideas, positive encouragement, build on one another's ideas, encourage unusual ideas); stages; brainstorming via electronic media, e.g. using social media instead of a face-to-face meeting

*Other techniques:* lateral thinking techniques, e.g. positive, negative, interesting (PNI), Edward de Bono Six Thinking Hats; mind mapping; free association

*Evaluation of ideas created:* against objectives; risk assessment; analysis of idea, e.g. costs versus benefits analysis, force field analysis; expression of idea as 'elevator pitch' (Aileen Pincus)

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 10: Delivering Professional Presentations	Unit 2: Understanding Public Relations Unit 5: Understanding the Media Landscape Unit 6: Understanding Public Relations Campaign Planning Unit 7: Communicating Effectively in Public Relations Unit 8: Pitching Public Relations Stories to the Media Unit 17: Understanding How to Win New Public Relations Business	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

As this unit includes both theoretical content and learning about the practical application of this theory some off-the-job delivery would usually be needed. However, this would be enhanced by drawing on workplace experiences. The most practical solution may be to allow groups of learners to undertake some creative work 'in parallel' to work being carried out by core staff on, say, a pitch. Effectively, they would be challenged to come up with some ideas to answer a brief using the techniques they have learned. If any great solutions are created they could then be included in the pitch.

For learning outcome 1, learners could share their workplace experiences to illustrate and explore the importance of creativity in the public relations industry. The theory which forms the rest of this learning outcome needs to be delivered systematically whether through face-to-face delivery in groups or through the use of learning materials. Either way learners would benefit from opportunities to discuss the theories to check their understanding and consolidate the learning.

For learning outcome 2, learners could participate in or observe workplace meetings during which ideas are generated, and share these experiences with other learners. In this way they could develop an understanding of how creativity is enhanced through the careful management of meetings and the use of tools and techniques.

The assessment criteria require learners to demonstrate evaluation skills so delivery could include group or individual activities which help learners to develop these skills.

## Assessment

Assessment methods need to be selected to give learners suitable opportunities to analyse and evaluate as required by the assessment criteria. This could be through a written assignment, a reflective journal or perhaps a presentation. If a presentation is used evidence should be collected in the form of an observation record which is sufficiently detailed to enable internal and external verification to take place. This should be supported by other evidence such as the learner's notes or visual aids.

To achieve learning outcome 1, learners should come to a reasoned assessment of the importance of creativity in the public relations industry and also analyse the theoretical content for this learning outcome. Learners should use examples from their experience to illustrate their assessments and analysis.

Assessment of learning outcome 2 can draw on workplace experiences, learning materials and individual research. A specific brainstorming session is needed for learners to evaluate for assessment criterion 2.3. This could be from the workplace, or one conducted as part of the programme of learning, or even a video of a brainstorm provided by the tutor.

## Resources

### Books

Ahmed P and Shepherd C – *Innovation Management* (Prentice Hall, 2010)  
ISBN 978-0273683766

de Bono E – *Six Thinking Hats* (Penguin, 2009) ISBN 978-0141033051

Green A – *Creativity in Public Relations* (4th edition) (Kogan Page, 2009)  
ISBN 978-0749456504

Hall, R – *Brilliant Business Creativity* (Prentice Hall, 2010) ISBN 978-0273730286

Hare K and Reynolds L – *The Trainer's Toolkit: Bringing Brain-Friendly Learning to Life* (Crown House Publishing, 2005) ISBN 978-1904424239

Stewart D and Simmons M – *The Business Playground* (Prentice Hall, 2010)  
ISBN 978-0273726883

### Journal

*Businessweek* – The Perfect (Elevator) Pitch (Aileen Pincus)



# Unit 5: Understanding the Media Landscape

Unit code:	T/504/0921
QCF Level 4:	BTEC Professional
Credit value:	6
Guided learning hours:	42

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## Unit aim

This unit provides the learner with an understanding of the work of the media and how public relations professionals connect with it.

## Unit introduction

The media, in all its guises, plays an essential role in effective public relations work. As a result public relations professionals need a broad and in-depth understanding of today's media landscape and how public relations can engage with it and harness its potential, for example through pitching stories into the media and planning for public relations campaigns.

Advances in technology are driving major changes across the media landscape and therefore the work of those engaged in the sector. Public relations professionals must keep abreast of these changes, maintaining an up-to-date knowledge of how the industry is changing and responding appropriately.

Learners will cover the whole media landscape and how public relations professionals connect with it. They will also learn to understand how to manage working relationships with journalists and others working in the media, as well as how the needs of different media types and their audiences vary.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the media landscape components</p>	<p>1.1 Compare different types of media platform in their ability to reach the maximum targeted audience for public relations messages</p> <p>1.2 Assess the development of media websites, digital and social media for disseminating public relations messages</p> <p>1.3 Analyse how different media components interact to disseminate public relations messages</p>
<p>2 Understand how public relations professionals engage with the media landscape</p>	<p>2.1 Explain methods of engaging with different media channels</p> <p>2.2 Construct media lists for given public relations outputs</p> <p>2.3 Justify the selection of contacts on media lists for given public relations outputs</p> <p>2.4 Analyse the value of monitoring and connecting with digital media to public relations professionals</p> <p>2.5 Discuss the importance to public relations professionals of maintaining media awareness</p>
<p>3 Understand how to manage relationships with media colleagues</p>	<p>3.1 Discuss, using examples, the need for codes of conduct in the media</p> <p>3.2 Assess the importance to public relations professionals of understanding the structures and roles of relevant media departments</p> <p>3.3 Assess the importance to public relations professionals of maintaining regular communication with journalists and media contacts</p>

Learning outcomes	Assessment criteria
4 Understand variations in the needs of different media and their audiences	<p>4.1 Evaluate the publication cycles of different types of media with regards to the work of public relations professionals</p> <p>4.2 Discuss, using examples, why different types of public relations outputs are required by different types of media</p> <p>4.3 Compare the story requirements for different media platforms</p>

## Unit content

### 1 Understand the media landscape components

*The media landscape:* size of the national media landscape to include number of organisations, number of employees, e.g. United Kingdom (UK) media landscape; political development of the landscape, including national media policies, e.g. the BBC, availability of broadband, phone hacking; media legislation; media accountability systems and regulation; difference between 'the public interest' and 'what interests the public'; development of the media and their journalists to include the importance and use of their websites, e.g. as the centre of media business, hub for different types of content, speed of distributing news to an increasingly mobile and reactive audience, time shifting, use of social media such as Facebook and Twitter, microsites; national media organisations to include newspapers, television, magazines, radio; regional media organisations; consumer and business-to-business (b2b) publications; target audiences and circulation figures; national global media organisations, e.g. BBC; other global media organisations, e.g. NewsCorp; use of the English language globally

*Technological developments in the media landscape:* advantages and disadvantages of technological developments to include online (websites), digital and social media; production of multi-format content for news releases, e.g. video clips, audio files, images

*Social media formats:* self-publishing and citizen journalism, e.g. blog posts, Twitter; prosumer - consumers who speak about product/service, e.g. ratings site, Trip Advisor; virtual world, e.g. Second Life; social bookmarking, e.g. Digg, Pinterest; social networking, e.g. LinkedIn, Facebook; user generated, e.g. YouTube; location based, e.g. check-ins, foursquare

### 2 Understand how public relations professionals engage with the media landscape

*Connecting with the media landscape:* practical operation of regional, national and global media organisations, e.g. UK national, regional and global media; typical structures of regional, national and global media organisations; titles, roles and responsibilities of employees, e.g. editors, sub-editors, producers, day planners, reporters; methods of interacting with media organisations; methods of engagement, e.g. through media agencies, digital media; distribution of public relations content via use of media databases, e.g. Gorkana; media lists; value of third party endorsements for public relations; maintenance of online/virtual press office, e.g. background information to support message; value of monitoring digital media sites; media awareness, e.g. who is writing what, PR blogs, current affairs, who is reading what, what's trending on social media

### 3 Understand how to manage relationships with media colleagues

*Relationship management:* codes of conduct; current issues relating to media relationships and their management; methods of networking; importance of networking; importance of establishing and maintaining trusted contacts; importance of regular meetings with contacts (formal, informal)

#### **4 Understand variations in the needs of different media and their audiences**

*Media and audience needs:* freedom of the media (UK and international); censorship; audience sensitivities; types of publication circulation, e.g. in-house, open, closed, controlled, request; types of article submitted by public relations professionals to the media; media publication cycles, lead times and deadlines relevant to public relations activities; reasons for different media publication cycles; quality of digital media content, e.g. information clarity, insight, entertainment, accuracy; story requirements for different media platforms, e.g. press, TV, radio, social media; websites

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
<p>Unit 10: Delivering Professional Presentations</p> <p>Unit 13: Develop Working Relationships with Colleagues and Stakeholders</p> <p>Unit 23: Plan and Organise Meetings</p> <p>Unit 24: Project Management Skills</p>	<p>Unit 2: Understanding Public Relations</p> <p>Unit 3: Understanding the Use of the Written Word for Public Relations</p> <p>Unit 4: Understanding the Creative Process to Generate Ideas</p> <p>Unit 6: Understanding Public Relations Campaign Planning</p> <p>Unit 7: Communicating Effectively in Public Relations</p> <p>Unit 8: Pitching Public Relations Stories to the Media</p> <p>Unit 12: Researching and Analysing Data for Public Relations</p> <p>Unit 15: Understanding Public Relations Work within Public Affairs</p> <p>Unit 17: Understanding How to Win New Public Relations Business</p> <p>Unit 18: Understanding Client Relationships in Public Relations</p> <p>Unit 19: Understanding the Importance of Brands in Public Relations</p> <p>Unit 27: Negotiation and Influencing</p> <p>Unit 28: Develop, Maintain and Review Personal Networks</p>	<p>Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management</p>

## Essential requirements

There are no special resources needed for this unit.

## Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, site visits, project work, research using the internet and/or library resources, and the use of personal and/or industry experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks by key stakeholders such as local or national media experts or employees and public relations professionals who focus on media relations. Site visits to major national and/or regional news organisations, with input from staff on their multi-media approach and the demands and constraints of each media channel, would be beneficial.

Delivery of learning outcome 1 could be achieved using case studies, for example the effects of public inquiries such as the Leveson Inquiry on the sector. It could be combined in part with the delivery of *Unit 2: Understanding Public Relations*. A media expert could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

For learning outcome 2, it is important that the tutor provides a theoretical background to the structure of organisations and to the titles, roles and responsibilities of those working in the media. They must also cover the range of key media databases used by public relations professionals and the development of media lists. Delivery should be as interactive as possible with learners using the resources in relation to real-life case studies or assignments. A media database representative could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

For learning outcome 3, it is important that the tutor delivers a general overview of the methods used by public relations professionals to manage relationships with media colleagues as set out within the relevant codes of conduct. Delivery must cover current relevant issues.

For learning outcome 4, tutors could cover the theory of the freedom of the media and censorship using as much real-life case study material as possible. A public relations professional is invited to talk to learners about the type of work they do and to, importantly, answer learner questions. A media professional could also be invited to talk about the strategies their organisation uses in relation to producing their media platforms. Learners should be required to prepare a range of pertinent questions in advance of such talks. This section should also focus on the requirement to understand the variations in needs of differing media, as in horizontal press such as national, regional and local newspapers, and vertical sector press such as trade, specialist and others, in addition to the varied requirements and deadlines of publications that are monthly, weekly, daily and online.

## Assessment

Assessment needs to be based on carefully selected and well-developed case studies. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

For learning outcome 1, it is important that learners show a clear understanding of the different types of media and their ability to reach the maximum targeted audience for public relations messages. Learners must also assess the development of media websites and social media for disseminating public relations messages. They should be encouraged to include adequate examples which show an in-depth understanding of the ability for each type of media to disseminate the information to the target audience.

For learning outcome 2, learners should be given a minimum of two realistic public relations scenarios to work to. The lists used in learner evidence must be realistic and sufficient in number to show that the scenario could be achieved by distribution of outputs to them. Learners must justify their choices with in-depth reasoning. For 2.4, learners must analyse the value of monitoring and connecting with digital media to the public relations professional. Evidence should be current, in depth and broad ranging.

For learning outcome 3, learners must cover each of the assessment criteria with breadth and depth. Examples used must be current and relevant.

For learning outcome 4, learners must evaluate the publication cycles of different types of media with regards to the work of public relations professionals. They must also discuss, using examples, why different types of public relations articles are required by different types of media. This may be related directly to the organisation that the learner works for or is aware of. Finally learners must compare the story requirements for different media platforms.

## Resources

### Books

Foster J – *Effective Writing Skills for Public Relations* (Kogan Page, 2008) ISBN 978-0749451097

Phillips D and Young P – *Online Public Relations: A Practical Guide to Developing an Online Strategy in the World of Social Media* (Kogan Page, 2009) ISBN 978-0749449681

Theaker A – *The Public Relations Handbook* (Routledge, 2011) ISBN 978-0415598149

Wilcox D L and Reber B H – *Public Relations Writing and Media Techniques* (Pearson, 2012) ISBN 978-0205873340

### Websites

[www.gorkana.com](http://www.gorkana.com)

Gorkana

[www.responsesource.com](http://www.responsesource.com)

Response Source

# Unit 6: Understanding Public Relations Campaign Planning

Unit code:	A/504/0922
QCF Level 4:	BTEC Professional
Credit value:	5
Guided learning hours:	32

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## Unit aim

This unit provides the learner with an understanding of how public relations campaigns are planned and evaluated.

## Unit introduction

Planning and implementing public relations campaigns are fundamental parts of the role of all public relations professionals. Through this unit learners will develop a fuller understanding of how the campaigns they may help to implement are planned and designed.

Learners will explore how overall strategic plans are developed. This includes positioning, internal analysis, external analysis, macro-environmental analysis, and how these are used before setting the objectives for a campaign.

Learners will then go on to learn how the strategy and tactics for a public relations campaign are devised. This includes audience profiling, media profiling, determining primary and supporting messages and the campaign methods used, as well as how the resources are managed.

Finally, learners will consider the importance of evaluating a public relations campaign and the methods used to do so.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand how strategic plans for public relations campaigns are devised</p>	<p>1.1 Describe the overall planning model for a public relations campaign</p> <p>1.2 Assess the current situation for a proposed public relations campaign</p> <p>1.3 Analyse how successfully a proposed public relations campaign meets set objectives</p>
<p>2 Understand how tactics for public relations campaigns are selected and developed</p>	<p>2.1 Analyse how audience, media and primary message are determined for a public relations campaign plan</p> <p>2.2 Analyse the selection of tactics used in a public relations campaign plan</p> <p>2.3 Explain how to allocate resources for a public relations campaign plan</p>
<p>3 Understand a variety of methods of evaluating public relations campaigns</p>	<p>3.1 Assess the methods used to evaluate public relations campaigns, giving examples</p> <p>3.2 Discuss the importance of the ongoing evaluation of public relations campaigns</p>

## Unit content

### 1 Understand how strategic plans for public relations campaigns are devised

*Overall planning model:* where are we now; where do we want to be; how are we going to get there; what tactics are we going to use; what resources do we need

*Where are we now:* positioning; intelligence gathering/analysis; internal analysis (organisation, market and competition, audience, budgetary constraints, company or client culture); external analysis (stakeholder analysis, reputation driver analysis, macro-environmental analysis – political, economic, social technological, environmental, legal factors – PESTEL); SWOT analysis (strengths, weaknesses, opportunities, threats)

*Where do we want to be:* aims; objectives hierarchy (corporate, public relations, public relations campaign); SMART objective setting (specific, measurable, achievable, realistic, time-bound)

### 2 Understand how tactics for public relations campaigns are selected and developed

*How are we going to get there:* strategy and tactics; audience profiling; identification of opinion formers; adoption curve; segmentation of audiences for readiness to adopt; type profiling of media (broadcast, print, online); face-to-face communications; content profiling of media; matching of media to target audience; targeting titles and programmes; selecting social media activities; planning face-to-face elements; define all elements of strategic approach, e.g. channel selection

*Messages:* purpose of defining primary and supporting messages; selecting messages (perception of organisation, values, views and language of audience, other current messages)

*Media relations methods:* hard news; soft news, e.g. purpose made surveys; news events; promotional content; direct news; selection of methods to attract media and target audience; timing

*Non-media relations channels:* methods, e.g. events, publications, sponsorships, corporate social responsibility (CSR); selection of methods to attract target audience; timing

*Allocation of resources:* time, cost, quality equation; activity lists; allocation of time to activities; identification of critical activities, milestones; scheduling work; management of financial resources

### 3 Understand a variety of methods of evaluating public relations campaigns

*Evaluation measures:* output objectives, e.g. coverage, readership, inclusion of key messages, equivalent advertising cost; out-take objectives, e.g. researched changes in attitude, awareness, acceptance, agreement with key messages; outcome objectives, e.g. changes in behaviour, sales, enquiries, website hits, votes; difficulty isolating public relations impact; cost; on-time and on-cost delivery; online measurements; offline measurements

*Importance:* e.g. on-time and on-cost delivery, ongoing process built in and adapted as go along, requirement for public relations campaign to add measurable value using at least one metric, evaluation metric to gauge progress towards meeting objectives, contribution to organisational goals, added value, return on investment (ROI)

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 5: Understanding the Media Landscape Unit 9: Delivering and Evaluating Public Relations Campaigns Unit 12: Researching and Analysing Data for Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

Most learners will need a structured learning programme which could be delivered through a combination of traditional tutor-led face-to-face group learning and online or distance learning through the use of materials and case studies. Learners would benefit from opportunities to apply models to case studies or to real contemporary public relations challenges and campaigns to consolidate their learning. Most learners are likely to have some involvement in contributing to the implementation of campaigns so there may be some opportunities to draw on this experience. If learners are able to be included in the development of public relations proposals and campaign planning within their working environment this will be beneficial.

For learning outcome 1, learners could work in small groups applying the various models to case studies. The learning is likely to emphasise the importance of continually updating knowledge of the business environment. Sufficient time should be allowed for this as there are several models in this section. Wherever possible, learners should be encouraged to get involved in the planning process to compile proposals, pitches and presentations, including research and intelligence gathering.

For learning outcome 2, learners could study current or recent public relations campaigns which use a variety of methods. Learners could identify primary and supporting messages and the target audience groups as well as the methods used. If learners' employers are supportive they may permit the sharing of information on recent campaigns. Another source of suitable case study material could be visiting speakers from the industry who could explain the rationale behind a particular campaign.

In learning outcome 3, learners should understand the importance of evaluation and develop a familiarity with common methodologies used to measure and evaluate the impact of public relations activities. Learners could apply these methods to the case studies they have used for learning outcomes 1 and 2.

## Assessment

The assessment methods used should give learners the opportunity to analyse, assess and discuss as required by the assessment criteria. Suitable methods may include written assignments or presentations or a combination of both.

For learning outcome 1, learners need to assess the current situation before a campaign is planned by applying tools, such as internal analysis, as listed in the unit content for this learning outcome.

For learning outcome 2, learners should analyse a public relations campaign plan including the target audience, media profiling, selection of methods and the management of resources. To satisfy the assessment criteria learners need to go beyond explaining what was planned and analyse why other options were discarded.

The assessment criteria for learning outcome 3 are generic and apply to more than one campaign. Learners should demonstrate that they fully understand the range of options available for evaluating a campaign and the benefits of different methods as well as the importance of undertaking an evaluation process.

## Resources

### Books

Bussey C – *Brilliant PR* (Prentice Hall, 2011) ISBN 978-027374658

Morris T and Goldworthy S – *PR Today* (Palgrave Macmillan, 2012)  
ISBN 978-0230 240094

Theaker A – *The Public Relations Handbook (Media Practice)* (4th edition)  
(Routledge, 2011) ISBN 978-0415598149

Wilcox D and Cameron G – *Public Relations: Strategies and Tactics* (10th edition)  
(Pearson, 2011) ISBN: 978-0205099160

### Websites

[amecorg.com](http://amecorg.com)

International Association for  
Measurement and Evaluation of  
Communication (AMEC)

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations  
(CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association  
(PRCA)

# Unit 7: Communicating Effectively in Public Relations

Unit code:	L/504/0925
QCF Level 4:	BTEC Professional
Credit value:	5
Guided learning hours:	25

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## Unit aim

This unit provides the learner with the opportunity to demonstrate competence in communicating effectively in the public relations profession.

## Competency unit assessment guidance

This unit should be assessed predominately in the workplace. Observation, witness testimony, questioning, professional discussion, written and product evidence are all sources of evidence which can be used.

## Unit introduction

Producing effective communications is the primary focus of public relations professionals. Key messages must be delivered accurately and in a format that is easily understood by the target audience. It is, therefore, imperative that public relations professionals who produce written communications, such as news or press releases, activity reports or presentations, are able to write properly and to deliver verbal presentations effectively.

Learners will produce evidence to show that they can create effective news releases and other written outputs within realistic timescales. 'Effective' in this instance means that the pieces of writing convey the message accurately in the agreed format and within the set timescale to meet target audience's needs.

Learners must also produce evidence that, throughout the process, they can communicate effectively with target audiences, internal and external, both directly and through third parties, such as media organisations, opinion formers and opinion leaders.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Be able to create effective press releases in a realistic timescale</p>	<p>1.1 Identify criteria for press releases from given briefs</p> <p>1.2 Create press releases from identified criteria to meet industry standards</p> <p>1.3 Evaluate press releases and make recommendations for improvement</p>
<p>2 Be able to create pieces of effective public relations writing, other than press releases, in a realistic timescale</p>	<p>2.1 Identify criteria for written public relations web and print outputs, other than press releases, from given briefs</p> <p>2.2 Create written public relations web and print outputs, other than press releases, from identified criteria to meet industry standards</p> <p>2.3 Evaluate written public relations web and print outputs, other than press releases, making recommendations for improvement</p>
<p>3 Be able to verbally communicate with public relations audiences effectively</p>	<p>3.1 Verbally communicate in an appropriate style and structure for different public relations audiences</p> <p>3.2 Evaluate verbal communications with different public relations audiences making recommendations for improvement</p>

## Unit content

### 1 Be able to create effective press releases in a realistic timescale

*Press releases:* story identification; identifying news angle; news values; working from a brief; identification of criteria from a brief; timescales; news release structure and format including notes to editor/boilerplate; distribution, e.g. media lists; tailoring a story to different audiences/media; audience sensitivities, e.g. UK and international; codes of conduct for writing, e.g. Public Relations Consultants Association (PRCA), the Chartered Institute of Public Relations (CIPR); style and structure of writing; persuasive writing; accuracy of grammar, spelling and punctuation; accuracy of facts; accuracy and ease of understanding of the message; placement of key messages; search engine optimisation (SEO) of press releases; identification and use of images; drafting image captions for maximum coverage

### 2 Be able to create pieces of effective public relations writing, other than press releases, in a realistic timescale

*Common public relations written outputs (excluding press releases):* online, e.g. web pages, blogs, show notes for podcasts, Twitter feeds; feature writing; award entries; presentations; story pitches; speeches; promotional literature; image captions; newsletters; client reports; invitation; news releases; constructing multi-media news releases (MNRs) including video clips and sound files for ease of recipient use, e.g. different file formats, produce for ease of production, no embedded sound so can be cut down in re-edit; search engine optimisation (SEO) where applicable to written output

Output development: story and idea identification; working to a brief; identification of criteria from a brief; timescales; format; distribution; tailoring to suit the audience; audience sensitivities, e.g. UK and international; codes of conduct; social media guidelines, e.g. PRCA; style and structure of writing; persuasive writing; accuracy of grammar, spelling and punctuation; accuracy of facts; accuracy and ease of understanding of the message; identification and use of images; placement of key messages

### 3 Be able to verbally communicate with public relations audiences effectively

*Public relations audiences:* internal; external, e.g. clients, opinion formers, opinion leaders, media

*Verbal communication:* timeliness; methods including telephone etiquette; style and structure relevant to target audience; politeness; audience sensitivities, e.g. UK and international; accuracy of facts; accuracy of grammar; accuracy and ease of understanding of the message; selling skills; appropriate use of language; body language; tone of voice

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 10: Delivering Professional Presentations Unit 13: Develop Working Relationships with Colleagues and Stakeholders	Unit 2: Understanding Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 5: Understanding the Media Landscape Unit 6: Understanding Public Relations Campaign Planning Unit 8: Pitching Public Relations Stories to the Media Unit 9: Delivering and Evaluating Effective Public Relations Campaigns Unit 12: Researching and Analysing Data for Public Relations Unit 19: Understanding the Importance of Brands in Public Relations Unit 27: Negotiation and Influencing	Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include writing exercises for different public relations written communications, lectures, seminars, workshops, presentations, project work, research using the internet and/or library resources, and the use of personal and/or commercial experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as public relations professionals.

Learners should be given the opportunity to practise their writing skills and to evaluate them in as many situations as possible. Delivery of this unit could be combined in part with delivery of *Unit 2: Understanding Public Relations*, *Unit 3: Understanding the Use of the Written Word for Public Relations* and *Unit 5: Understanding the Media Landscape*.

Learning outcome 1 could be delivered using simulated or real-life case studies or real-life situations. A media relations specialist and/or working journalist could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. It is important that learners understand that journalist requirements must be balanced with what a public relations professional needs to achieve from the release. Learners should be required to prepare a range of pertinent questions in advance of such talks.

For learning outcome 2, simulated or real-life case studies or real-life situations could be used. A public relations professional who has experience in other areas of practice could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should have the opportunity to work with as many types of written communications outputs as possible, including awards entries, features, web copy, promotional literature, blogs, podcasts, tweets and presentations.

Learning outcome 3 could be delivered using simulated or real-life situations. Again, a public relations professional could be invited to talk to learners about the type of work they do and answer learner questions. Learners should have the opportunity to practise in as many different types of situation as possible.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Assessment needs to be based on carefully selected and well-developed simulated or real-life situations. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

Consistency of achievement is important for all three learning outcomes. However, it is important that learners are able to evaluate their own work and make appropriate recommendations for improvement where applicable.

For learning outcomes 1 and 2, a minimum of three different situations should be used for the generation of evidence for each learning outcome. For learning outcome 2, at least two different types of output should be given as evidence. All situations should be evaluated.

For learning outcome 3, a minimum of three verbal and three written communication activities should be used to provide evidence. All situations should be evaluated. Verbal evidence could be in the form of video or other form of recording of the presentation or by direct tutor assessment during the presentation.

## Resources

### Books

Foster J – *Effective Writing Skills for Public Relations* (Kogan Page, 2008)  
ISBN 978-0749451097

Green A – *Effective Communication Skills for Public Relations* (Kogan Page, 2006)  
ISBN 978-0749444075

Phillips D and Young P – *Online Public Relations: A Practical Guide to Developing an Online Strategy in the World of Social Media* (Kogan Page, 2009)  
ISBN 978-0749449681

Theaker A – *The Public Relations Handbook* (Routledge, 2011)  
ISBN 978-0415598149

Wilcox D L and Reber B H – *Public Relations Writing and Media Techniques*  
(Pearson, 2012) ISBN 978-0205873340

# **Unit 8: Pitching Public Relations Stories to the Media**

Unit code: R/504/0926  
QCF Level 4: BTEC Professional  
Credit value: 4  
Guided learning hours: 22

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## **Unit aim**

The aim of this unit is to enable learners to pitch public relations stories and feature articles to the media.

## **Competency unit assessment guidance**

This unit should be assessed predominantly in the workplace. Observation, witness testimony, questioning, professional discussion, written and product evidence are all sources of evidence which can be used.

## **Unit introduction**

'Pitching' or 'selling' stories to the media is an essential skill for public relations professionals. Media relations is one of the biggest parts of public relations and is regarded as a specialism within the profession.

Each story or feature idea pitch, media organisation and media type are different, requiring variations in strategies and tactics for the pitch to succeed in generating coverage.

Learners will cover and practise using the different skills, strategies and tactics available to public relations professionals, selecting and using the appropriate ones to pitch their stories successfully. They will also obtain and use feedback relating to their pitching of stories to the media.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Be able to select strategies and tactics to pitch stories to the media</p>	<p>1.1 Select strategies used to pitch stories to the media, justifying the selection</p> <p>1.2 Select tactics used to pitch stories to the media, justifying the selection</p>
<p>2 Be able to use strategies and tactics to successfully pitch stories to the media</p>	<p>2.1 Implement selected strategies to successfully pitch stories to the media</p> <p>2.2 Implement selected tactics to successfully pitch stories to the media</p>
<p>3 Be able to obtain and use feedback relating to pitching stories to the media</p>	<p>3.1 Obtain relevant feedback from appropriate people relating to pitching stories to the media</p> <p>3.2 Analyse feedback from appropriate people relating to pitching stories to the media</p> <p>3.3 Make recommendations for improving the pitching of stories to the media in the future</p>

## Unit content

### 1 Be able to select strategies and tactics to pitch stories to the media

*Strategies and tactics:* definition of 'strategy' and 'tactic'; finding pitching opportunities, e.g. through online media databases, forward features lists, specialist subscription services, personal contacts/networks; advantages and disadvantages of types of strategy to achieve the organisational goal including the Pareto Principle; advantages and disadvantages of types of tactic to achieve the organisational strategy criteria used in selection of strategies and tactics; media organisations (interests, background, type); personal and professional methods of building contacts and knowing their interests to gain interest; prior coverage considerations; methods used to develop pitch; differences between pitching a news story and pitching for inclusion in a feature, e.g. timings; methods used to make pitch, e.g. email, telephone, social media; methods used to follow up post-pitch; keeping track of pitches (organisation techniques, administration)

### 2 Be able to use strategies and tactics to successfully pitch stories to the media

*Strategies and tactics:* implementation of strategies, e.g. segmenting target media on Pareto Principle; planning and prioritising; resources; timescales (media production, differences for websites, TV, radio and daily, weekly and monthly print publications); implementation of tactics; methods; personnel required; resources required to pitch story, e.g. story length, style, presentation method/equipment); persuasive talking, e.g. telephone script with 6-point plan for story; questioning skills; listening skills; negotiation, influencing and selling skills; importance of understanding and meeting journalistic deadlines; professional integrity, e.g. promising only what can be delivered; different drivers and appeal to different media, e.g. visual element for TV, interviewee for radio, pictures, sound files and video clips for websites; extra coverage through picture captions, letters and diary pieces; success measures

### 3 Be able to obtain and use feedback relating to pitching stories to the media

*Feedback:* methods used to obtain feedback, e.g. 'call and contact list' to record details from each pitch; criteria for choosing method of obtaining feedback; methods used to analyse feedback; choice of reaction to feedback, e.g. suggest develop story, change style, develop new story angle, add quotes; sources of feedback

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 10: Delivering Professional Presentations Unit 13: Develop Working Relationships with Colleagues and Stakeholders	Unit 2: Understanding Public Relations Unit 3: Understanding the Use of the Written Word for Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 5: Understanding the Media Landscape Unit 6: Understanding Public Relations Campaign Planning Unit 7: Communicating Effectively in Public Relations Unit 9: Delivering and Evaluating Effective Public Relations Campaigns Unit 12: Researching and Analysing Data for Public Relations Unit 19: Understanding the Importance of Brands in Public Relations Unit 27: Negotiation and Influencing	Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, site visits, project work, research using the internet and/or library resources, and the use of personal and/or industrial experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as public relations professionals, as well as journalists from news websites, television production companies and news channels, radio news desks (day and forward planners), and reporters from print media (news and features).

Learners should be given the opportunity to practise and evaluate their pitching skills in as many situations as possible, preferably through observed practical exercises. Delivery of this unit could be combined in part with delivery of *Unit 2: Understanding Public Relations*, *Unit 3: Understanding the Use of the Written Word for Public Relations* and *Unit 5: Understanding the Media Landscape*.

Delivery of learning outcome 1 could be achieved using simulated or real-life case studies or real-life situations. A media relations specialist and working journalist could be invited to talk to learners about the type of strategies and tactics they use or respond to and answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

For learning outcome 2, simulated or real-life case studies or real-life situations could be used. Learners should have the opportunity to work with as many types of pitch as possible and should include face-to-face, telephone, email and other electronic methods of making a pitch, such as Twitter.

Delivery of learning outcome 3 could be achieved using simulated or real-life situations, with a tutor-led discussion on possible responses to feedback. A media relations specialist could be invited to talk to learners about how they obtain and respond to feedback and to, importantly, answer learners' questions. Learners should have the opportunity to practise with as many different types of situation and feedback as possible.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Assessment needs to be based on carefully selected and well-developed simulated or real-life situations. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

Consistency of achievement is important for all three learning outcomes. However, it is important that learners are able to evaluate their own work and make appropriate recommendations for improvement where applicable. For learning outcomes 1 and 2, a minimum of three different pitches should be used to generate evidence. These same pitches should provide evidence for all three learning outcomes. Feedback on all pitches should be obtained from internal and external colleagues and evaluated for learning outcome 3.

For all the learning outcomes, tutors could provide a spreadsheet or other appropriate document showing all pitching opportunities over a set period (for example three months) for a particular client, product or campaign. This could then be completed by learners to include tactics considered, tactics used and feedback given. The spreadsheet used should be similar to industry-standard documents that track pitching opportunities.

## Resources

### Books

Foster J – *Effective Writing Skills for Public Relations* (Kogan Page, 2008)  
ISBN 978-0749451097

Green A – *Effective Communication Skills for Public Relations* (Kogan Page, 2006)  
ISBN 978-0749444075

Phillips D and Young P – *Online Public Relations: A Practical Guide to Developing an Online Strategy in the World of Social Media* (Kogan Page, 2009)  
ISBN 978-0749449681

Theaker A – *The Public Relations Handbook* (Routledge, 2011)  
ISBN 978-0415598149

Wilcox D L and Reber B H – *Public Relations Writing and Media Techniques*  
(Pearson, 2012) ISBN 978-0205873340

# Unit 9: Delivering and Evaluating Public Relations Campaigns

Unit code:	Y/504/0927
QCF Level 4:	BTEC Professional
Credit value:	6
Guided learning hours:	38

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## Unit aim

This unit provides the learner with the skills required to contribute to the delivery and evaluation of public relations campaigns.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace. Observation, witness testimony, questioning, professional discussion, written and product evidence are all sources of evidence which can be used.

## Unit introduction

Delivering and implementing public relations campaigns are fundamental parts of the work of public relations professionals. In this unit learners will develop the skills needed to play a full role in contributing to the implementation of public relations campaigns. Whilst learners may not be involved in developing strategy or deciding what tactics are to be used, it is vital that they understand enough about the campaign to enable them to manage their own contribution. The first learning outcome focuses on the learner competently receiving and clarifying their own objectives for their contribution to their campaigns.

They can then develop their planning skills, which draw on project planning protocols, before going on to implement the activities they have planned. Learners need to demonstrate that they can implement campaigns accurately, reliably and cooperatively with others and that they monitor their own work and its results on an ongoing basis.

Finally, learners will learn how to evaluate their own contribution and the contribution of the public relations campaign to business or overall campaign objectives in order to make suggestions as to how implementation could be improved in the future.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Be able to clarify objectives for own contribution to the delivery of public relations campaigns</p>	<p>1.1 Identify overall aims and objectives for public relations campaigns, including tactics</p> <p>1.2 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives for own contribution to delivery of public relations campaigns</p> <p>1.3 Demonstrate awareness of own deliverables in relation to overall public relations campaigns</p>
<p>2 Be able to plan own actions to achieve objectives of public relations campaigns</p>	<p>2.1 Plan activities needed to achieve agreed objectives when contributing to public relations campaigns</p> <p>2.2 Acquire resources needed to meet agreed objectives for delivery of public relations campaigns</p> <p>2.3 Make contingency plans for critical activities</p>
<p>3 Be able to implement planned actions to contribute to the delivery of public relations campaigns</p>	<p>3.1 Carry out planned activities to contribute to the delivery of public relations campaigns</p> <p>3.2 Demonstrate effective teamwork skills when contributing to public relations campaigns</p> <p>3.3 Monitor progress against objectives, adapting plans as necessary</p>
<p>4 Be able to evaluate own contribution to public relations campaigns</p>	<p>4.1 Evaluate own contribution to the delivery of agreed objectives for public relations campaigns</p> <p>4.2 Identify own development needs to support future public relations campaigns</p>

Learning outcomes	Assessment criteria
<p>5 Be able to evaluate the implementation of public relations campaigns</p>	<p>5.1 Evaluate the usefulness of the activities against public relations campaign plans</p> <p>5.2 Evaluate the implementation of public relations campaigns</p> <p>5.3 Make suggestions for improvements to the implementation of public relations campaigns</p>

## Unit content

### 1 Be able to clarify objectives for own contribution to the delivery of public relations campaigns

*Overall planning model:* where are we now; where do we want to be; how are we going to get there; what tactics are we going to use; what resources do we need, SWOT analysis (strengths, weaknesses, opportunities, threats); PESTEL analysis (political, economic, social, technological, environmental, legal); resources allocated to campaign, e.g. physical human, financial; time management and timeline; costing and fee rates

*Aims and objectives:* overall campaign aims; overall objectives; cascading of campaign objectives; SMART objectives (specific, measurable, achievable, resourced, time-bound)

*Own contribution:* contribution to overall campaign aims; contribution to overall campaign objectives; cascading of campaign objectives; own SMART objectives (specific, measurable, achievable, resourced, time-bound); specific deliverables; deadlines; resources; importance of clarifying objectives, e.g. to enable activity planning, check feasibility; understanding of overall objectives; priorities, reporting arrangements; critical activities; own contribution to implementing tactics, e.g. channels; outputs and activities; understanding target campaign audience (how to segment, purpose of segmenting); tailoring key messages to individual audience

### 2 Be able to plan own actions to achieve objectives of public relations campaigns

*Own plan:* planning and delivery of outputs; listing of tasks; booking equipment and accommodation; time management; trial run through; risk analysis, e.g. identification of potential problems; internal communication in team, e.g. to manager, to colleagues; internal and external liaison

*Acquiring resources:* human; physical; financial budget; modifying plans to fit resources; management of databases, e.g. media, suppliers, audiences

*Identifying critical activities:* prioritisation; dependencies; critical path; contingency plans

### 3 Be able to implement planned actions to contribute to the delivery of public relations campaigns

*Implement actions:* accuracy; reliability; cooperation with others; flexibility; appropriate attitude and personal presentation

*Monitor plans against objectives:* campaign objectives; cascaded objectives; resource and time allocation; media monitoring techniques, e.g. against campaign objectives

*Teamworking:* communication skills; support for team objectives; support for team members

**4 Be able to evaluate own contribution to public relations campaigns**

*Methods of evaluation:* media analysis, e.g. analysing press coverage by tone, key message, audience reach, advertising value equivalent (AVE); opportunities to see (OTS); market research, e.g. focus groups, surveys; online analysis, e.g. audience traffic through seeded websites, message uptake on social media sites; internal and external feedback, e.g. managers, colleagues, clients

*Evaluate own contribution:* to overall campaign aims; to overall campaign objectives; achievement of own SMART objectives (specific, measurable, achievable, resourced, time-bound); success of specific deliverables; meeting deadlines; use of resources

**5 Be able to evaluate the implementation of public relations campaigns**

*Methods of evaluation:* media analysis, e.g. analysing press coverage by tone, key message, audience reach, advertising value equivalent (AVE); opportunities to see (OTS); market research, e.g. focus groups, surveys; online analysis e.g. audience traffic through seeded websites, message uptake on social media sites

*Evaluation of implementation:* assess value of public relations campaign; use of selected metrics to analyse campaign and personal performance against planned objectives, including outputs, out-takes and outcomes; accuracy; to time; to budget; evaluation points, e.g. throughout implementation to adapt activities as required, on completion (lessons learned)

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 24: Project Management Skills	Unit 2: Understanding Public Relations Unit 5: Understanding the Media Landscape Unit 6: Understanding Public Relations Campaign Planning	n/a

### Essential requirements

Learners need to be able to contribute to the implementation of public relations campaigns.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace. *Unit 6: Understanding Public Relations Campaign Planning* includes the knowledge element of public relations campaigns and it would be beneficial for the delivery of the two units to be planned so that they complement each other. Often this would mean that the knowledge unit would be delivered before or alongside this practical unit. It cannot, however, be assumed that if a learner has completed Unit 6 then no more knowledge is needed because this unit includes knowledge that is related specifically to implementation such as team skills, managing resources and project management.

As with much workplace training skills could be developed through enabling learners to assist a more experienced colleague who is supporting the implementation of public relations campaigns. Learners could gradually take on more responsibility and also be given feedback and encouragement from the more experienced staff member or from a manager. If this approach is adopted the unit content should be used to form a checklist to ensure that all parts are included in the learner's workplace learning programme. This would also highlight any gaps which could be filled through independent research, use of learning materials or attendance on training courses. The CIPR website includes an evaluation toolkit which may be useful in relation to objective and measurement setting.

### Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Evidence is likely to be in a variety of forms including records of meetings, plans, reflective journals, photographs, records of observations made by the assessor and witness testimonies from colleagues and managers. Measurement of campaign outputs, out-takes and outcomes using qualitative and quantitative data may also form part of the evidence.

For learning outcome 1, learners will need to attend meetings at which they can discuss the objectives which have been cascaded down to them.

For learning outcome 2, learners need to make plans for contributing to public relations campaigns. These plans do not need to cover whole campaigns but must cover the objectives cascaded down to the learner. It is also important that learners devise the plans themselves, even if they are not the ones used for the actual campaign.

To achieve learning outcome 3, learners need to contribute to the implementation of public relations campaigns.

For learning outcome 4 and 5, learners need to demonstrate their evaluation skills and evaluate both their own contribution and whether the activities were useful in helping to achieve the objectives in the public relations campaign plan. For this they will need to use common evaluative metrics to determine success and return on investment (ROI) of the contribution made by the PR campaign.

For all learning outcomes, learners should draw evidence from working on more than one public relations campaign.

## Resources

### Books

Bussey C – *Brilliant PR* (Prentice Hall, 2011) ISBN 978-027374658

Morris T and Goldworthy S – *PR Today* (Palgrave Macmillan, 2012)  
ISBN 978-0230240094

### Websites

[amecorg.com](http://amecorg.com)

International Association for Measurement and Evaluation of Communication (AMEC)

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations (CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association (PRCA)



# Unit 10: Delivering Professional Presentations

Unit code:	D/504/0928
QCF Level 3:	BTEC Professional
Credit value:	3
Guided learning hours:	22

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## Unit aim

This unit provides learners with the skills needed to design, prepare, deliver and evaluate professional presentations.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace. Observation, witness testimony, questioning, professional discussion, written and product evidence are all sources of evidence which can be used.

## Unit introduction

Public relations professionals are called on to give presentations to different audiences and for different purposes. This unit is designed to enable learners to develop the presentation skills needed to succeed in a career in the industry.

Learners will consider how to design and plan presentations to meet a range of different requirements. This includes learning how to select and use visual aids and how to integrate digital content into presentations.

Learners will also focus on delivering presentations and will develop appropriate verbal and non-verbal communication skills. They will also learn how to create an appropriate initial impression and a clear ending, as well as how to deliver presentations jointly with colleagues and how to manage questions from the audience.

Learners will have the opportunity to evaluate presentations and how to use the results of these evaluations to improve subsequent presentations. This is a practical unit and delivery and assessment could include both off-the-job or workplace delivery and assessment.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Be able to prepare presentations</p>	<p>1.1 Define aims to meet audience needs for different types of presentation</p> <p>1.2 Prepare presentation content, using appropriate presentation methods, styles and structure to engage with different audiences within available time</p> <p>1.3 Design visual aids for presentations</p> <p>1.4 Prepare visual aids for presentations</p> <p>1.5 Plan handling of expected and unexpected events during presentations</p> <p>1.6 Plan the use of chosen equipment to best effect</p> <p>1.7 Practise delivery of presentations</p>
<p>2 Be able to deliver presentations</p>	<p>2.1 Deliver presentations within allocated time, clearly and confidently, using language appropriate to the topic and audience</p> <p>2.2 Create a positive professional impression by varying vocal tone, pace and volume to emphasise key points to maintain audience's interest when giving presentations</p> <p>2.3 Use body language to reinforce the message of the presentation</p> <p>2.4 Use visual aids appropriately to clarify and emphasise key messages</p> <p>2.5 Manage transitions between parts of presentations, speakers and equipment</p> <p>2.6 Monitor audience reaction, adapting presentation and delivery accordingly</p>

<b>Learning outcomes</b>	<b>Assessment criteria</b>
	2.7 Provide opportunities for questioning 2.8 Respond to questions in a way that meets the audience's needs 2.9 Close presentations with appropriate key messages and courtesy
3 Be able to evaluate presentations	3.1 Determine success criteria for presentations 3.2 Evaluate presentations against success criteria 3.3 Determine actions to improve presentation skills

## Unit content

### 1 Be able to prepare presentations

*Types of presentation:* internal; external; formal; informal; face to face; online; recorded; group/team; individual

*Purposes:* informing managers; briefing staff; pitching; other, e.g. progress reporting to client

*Design of presentation:* consideration of aims and audience; basic structure, e.g. tell them what you are going to tell them, tell them, tell them what you have told them; selection of content (musts, shoulds, coulds); checking and referencing assertions and facts; subdividing and ordering content, e.g. by objectives, chronological order, use of teasers, building suspense, placing of questions, need for impact at end; contingency planning, e.g. awkward question, over or under running time, equipment failure

*Selection of visual aids:* emphasise key messages; value of involving different senses; danger of overuse/misuse of visual aids; importance of clarity, legibility, coherent design of visual aids

*Use of presentation software:* limit content of each slide; notes facility; conceal and reveal technique; animations; links to websites; sound effects; timing of handing out copies of slides; use of detailed notes for post-presentation reading

*Use of digital content:* selection of extracts; planning of introductions; smooth transitions; contingency planning for technical problems

*Venue:* distance from audience; physical layout; planning presentation to fit venue

### 2 Be able to deliver presentations

*Initial impact:* personal presentation; dress codes to fit culture and expectations of audience; confident presence; taking charge; dealing with domestics

*Non-verbal communication:* importance; posture; facial expressions; gestures; managing eye contact; seating or standing decisions; sensitivity to different cultural norms in non-verbal communications, e.g. pointing, shaking hands

*Verbal communication:* volume; pitch; tone; degree of formality in use of language; choice of words and pace in light of audience needs, e.g. English not a first language, political or other sensitivities; consideration and courtesy for audience; care over use of humour; not reading from script

*Joint presentations:* techniques for introducing co-presenter; responding to introduction; handing over to co-presenter; reading non-verbal cues of co-presenter

*Questions:* introducing opportunity to ask; planted questions; handling too many or too few questions; complicated questions; techniques where answer not known; transition between questions and presentation

*Ending presentations:* reiteration of key points; acknowledgements; thanking audience; follow-up opportunities; saying goodbye

### 3 **Be able to evaluate presentations**

*Measures:* objectives; impact of key messages; clarity; legibility; impression created

*Evaluation techniques:* achievement of objectives; feedback, e.g. from audience, from peers, from colleagues; analysis of recordings

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 3: Understanding the Use of the Written Word for Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 7: Communicating Effectively in Public Relations Unit 8: Pitching Public Relations Stories to the Media Unit 17: Understanding How to Win New Public Relations Business	n/a

### Essential requirements

Learners need opportunities to develop and demonstrate their presentation skills including the use of visual aids.

### Delivery

This is a practical unit and much of the delivery and assessment could be based in the workplace. However, learners may also benefit from some formal classroom delivery on how to design and deliver presentations followed by opportunities to practise in a non-threatening situation before going on to make presentations to colleagues. If all, or part, of the delivery is to be based in the workplace it would be helpful to use a checklist to ensure that the learner has sufficient opportunities to explore all the different parts of the unit content.

Delivery should enable learners to develop their skills gradually over a period of time. In the early stages, assisting an experienced colleague to prepare for a presentation and then observing their delivery, perhaps playing a role in assisting with administrative tasks, would provide an opportunity to start to build the relevant skills, knowledge and confidence. At a later stage, learners could design their own short, simple presentations to be delivered within the organisation perhaps to a small team before moving on to more demanding audiences and situations. Constructive feedback and reflection are important learning tools to ensure that learners build on good practice and identify scope for improvement.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

As this is a practical unit which assesses workplace competence evidence could be drawn from work undertaken in the course of the learner's performance of their role in the workplace. However, it may not be possible to provide a suitable range of presentation opportunities for learners and, in this case, simulation exercises can be used, for example to provide an opportunity to demonstrate competence in presenting to an external audience, and colleagues or fellow learners could play the role of the external audience. The assessor can devise an assessment plan that fits the needs of the learner and the opportunities available in their workplace.

Evidence of achievement should be collected in a paper-based or electronic portfolio and referenced against the assessment criteria.

Types of evidence include product evidence such as planning notes, visual aids or audio or audiovisual recordings of presentations made by the learner, a reflective journal, records of observations made by the assessor and witness testimonies written by colleagues and managers.

To achieve all the assessment criteria in full and demonstrate competence it will be necessary to draw evidence from several presentations.

## Resources

### Books

Barker, A – *Improve Your Communication Skills (2nd Edition)* (Kogan Page, 2010)  
ISBN 978-0749456276

Fitzherbert N – *Presentation Magic* (Marshall Cavendish, 2011)  
ISBN 978-9814328319

Gallo C – *The Presentation Secrets of Steve Jobs: How to Be Insanely Great in Front of Any Audience* (McGraw Hill, 2010) ISBN 978-0071636087

Hall, R – *Brilliant Presentation (3rd edition)* (Prentice Hall, 2011)  
ISBN 978-0273762461

Leigh A – *The Charisma Effect* (Prentice Hall, 2008) ISBN 978-0273717218

Morris T and Goldworthy S – *PR Today* (Palgrave Macmillan, 2012)  
ISBN 978-0230240094



# Unit 11: Plan and Manage your Own Workload

Unit code:	D/601/2654
QCF Level 3:	BTEC Professional
Credit value:	2
Guided learning hours:	7

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## Unit aim

This unit provides learners with the understanding and skills to plan and manage their workload effectively.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

In any career, or personal pursuit, planning and managing a workload is an essential skill. In public relations, where work will often be needed on several varied projects, with multiple stakeholders at the same time, efficient planning and organisation is one of the most valuable skills an employee can have.

In this unit, learners will gain a theoretical understanding of time management principles and also a practical grounding in how to apply these skills, including how to approach problems with managing their workload. They will also learn to adapt their approach to workload management across a range of public relations situations and environments.

Planning and managing a workload well is not just beneficial within a person's role as an employee. It facilitates a better work/life balance, better relationships with colleagues and could enable a learner to take on more projects.

By the end of the unit, learners should be able to plan and manage their workload to achieve their maximum potential without becoming stressed or compromising the quality of their work, and evaluate these skills to continually improve their productivity.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
1 Understand how to plan own workload	1.1 Explain how to prioritise own workload 1.2 Explain how to plan pieces of work according to their urgency and importance 1.3 Explain how to identify when meetings are necessary 1.4 Clarify the purpose and value of planning own workload 1.5 Clarify the purpose and value of managing own time and commitments 1.6 Compare different methods of time and diary management that are available to them
2 Understand how to manage own workload	2.1 Explain how to identify the resources available for own work 2.2 Describe how to select resources that are needed for own work 2.3 Clarify the purpose and value of working according to agreed timescales 2.4 Clarify the purpose and value of keeping records of own work 2.5 Explain the purpose and value of keeping others updated with progress 2.6 Clarify the purpose and value of flexibility and of adapting and re-prioritising work plans to reflect changes 2.7 Explain how to accommodate changes in own plans and renegotiate deadlines where necessary 2.8 Clarify the purpose and value of reflecting on the outcomes of your plans and of identifying learning points for the future

Learning outcomes	Assessment criteria
3 Be able to plan own work	3.1 Prioritise work according to its importance and urgency 3.2 Plan work in line with objectives and deadlines 3.3 Prioritise own time in line with work plan
4 Be able to manage own work	4.1 Make sure all the necessary resources are available 4.2 Allocate estimated time-frames to each activity 4.3 Keep records to monitor own work 4.4 Make records of own work available to others as required 4.5 Liaise with and update people who are contributing to the work 4.6 Resolve problems where necessary 4.7 Adapt and re-prioritise work plans to reflect changing circumstances 4.8 Review and reflect on the outcomes of your plans and identify learning points to improve future work planning activities

## Unit content

### 1 Understand how to plan own workload

*Workload:* definition of workload, e.g. projects you are personally responsible for, providing help or expertise to colleagues, keeping clients and teams informed, chasing new business, maintaining an orderly work environment; understanding that a workload comprises a range of tasks and different levels of responsibility

*Plan:* understand the importance of prioritising, according to different considerations, e.g. urgency, task importance, availability of alternatives, seniority of task giver, consequences of failure, own goals and ambitions; identify when meetings are necessary, e.g. consider stakeholders, deadline and complexity; identify when input from others may be required; anticipate busy or quiet periods and adjust accordingly

*Purpose and value:* purpose of planning own workload, e.g. helping colleagues, achieving maximum potential at work, increased capacity, increased productivity; purpose of planning own time and commitments, e.g. stress relief, improved personal life, greater flexibility

*Different planning methods:* selection of method to suit personal style and role; understanding that a variety of methods may be suitable in different situations; evaluation of benefits of different planning tools, e.g. formal/informal, paper/digital, private/collaborative

### 2 Understand how to manage own workload

*Manage workload:* keeping records of workload plans, e.g. planned order of work, contingencies, involved parties, timescales, deadlines; sharing plans and records with others, e.g. clients, colleagues, freelancers; identifying and using resources available to achieve plan, e.g. meetings, help from contacts, specialist equipment or software, external events, journals, books, online resources; time management, e.g. task list management, diary management, managing communications (email management, mailing list), prioritisation of tasks, negotiation of tasks with colleagues

*Purpose and value of effective workload management:* working to agreed timescales, e.g. unified understanding, achieve overall goals, meet project deadlines; keeping up-to-date records, e.g. aid memory, ease of sharing information, providing evidence; keeping others up to date, e.g. inviting new information, access to skills

*Adapt plans:* reprioritising workload plans according to a change in position, e.g. differing priorities, a change in circumstances, slippage on previous timescales or budget constraints; keeping stakeholders informed as to any changes; remaining aware of essential constraints on future projects even when plans change; renegotiating deadlines, budgets and input from others

*Realistic time management and reappraisal:* not volunteering for an unsustainable workload; making competing claimants on time aware of the overall situation; constantly appraising workload and ability to cope; constantly appraising success of prioritisation

### 3 **Be able to plan own work**

*Planning own work:* plan work according to deadlines and objectives; demonstrate prioritisation according to importance and urgency; use work plan when apportioning own time and communicating with others; ensure tasks are not forgotten or overlooked by checking plan and records regularly

### 4 **Be able to manage own work**

*Managing own workload:* make sure all necessary resources are available; be aware of potential problems; deal quickly with timescale or budget issues which do arise; keep records of workload and of any issues with plan

*Workplace environment:* estimate practical timelines for real work environment; keep others apprised of successes and problems in work; make records of own work available to others; organise workplace so as to minimise stalling or wasted time, e.g. difficulty accessing resources or work plan, problems with systems or computers

*Self-evaluation:* change prioritisation according to any problems or missed opportunities; consider whether plan is working, e.g. realistic, well suited to individual, clear to others, successful in achieving maximum output

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance at Work	Unit 2: Understanding Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This unit should enable learners to demonstrate a high degree of day-to-day independence, allowing them to use workload planning and management skills within the context of this unit. A combination of written, group-based and presentation exercises will show learners how different types of work can be managed concurrently.

As a competency unit it is important that learners demonstrate that they can put theory into practice, showing that they are able to plan and manage their own work to complete tasks to deadlines. Every learner should be able to provide examples on areas such as prioritising tasks, time management skills, work/life balance, and resolving workload issues. For learning outcomes 3 and 4, these examples will be particularly important. Learners will be able to provide examples for most of these functions from their experiences at work in public relations for example holding events, attending meetings, campaigning, or managing people. For evidence of more specific tasks, learners might be encouraged to draw examples from other relevant work.

Tutor presentations on content such as methods of organising work, can be supplemented by further reading to clarify the content. To understand how to analyse the purpose and value of workload management learners may benefit from sharing ideas, working in small groups and feeding back to the class.

Evaluation of personal experience and skills is vital and will vary according to each individual, but learners may not be comfortable sharing this information. Guest speakers can be particularly useful here, in providing a range of perspectives and opening discussion. Learners might participate in discussions on how identified problems could have been solved or avoided, and be encouraged to relate this to their own experiences through private written work.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Assessment of learning outcome 1 could be combined as a written piece explaining how to plan a workload to someone starting their first job in the PR industry, ensuring they compare different methods available for managing time and diaries.

Assessment of learning outcome 2 could be combined as a portfolio of evidence, with notes, relating to resources and timescales helpful to the learner's workload (current or, if this is not feasible, past or hypothetical). Assessment criteria 2.6, 2.7 and 2.8 could be combined in a short presentation on, or small-group analysis of, a situation where plans or deadlines had to be changed and the action taken.

Assessment of learning outcome 3 could be combined as a formal workload plan for a set period of the learner's work, which may include input from their employer. Learners should show how they have prioritised according to importance and urgency and show clear objectives and deadlines for each piece of work.

Assessment of learning outcome 4 could be combined as a report on a piece of past work, including workload management actions taken and learners' records. It may be supported by feedback from colleagues, managers or clients on how time management skills have been developed and the impact this has had. Learners should be encouraged to keep clear, accurate and reasonably detailed records of work completed and in progress. Assessment criteria 4.6, 4.7 and 4.8 could be combined as participation in a group discussion with a guest speaker, followed by small-group analysis or a short written task on the learner's own experiences. Learners should give examples of where they have had to solve problems and how they have dealt with changing circumstances.

## Resources

### Books

Allen, D – *Getting Things Done: The Art of Stress-Free Productivity* (Viking Adult, 2001) ISBN 978-0670899241

Bingham R and Drew S – *Key Workskills, Chapter: Planning and Managing your Workload* (Gower, 1999) ISBN 978-0566081835

Harvard Business School – *Business Review on Work and Life Balance* (Harvard Business Review Paperback Series) (Harvard Business Press, 2000) ISBN 978-1578513284

### Websites

- <http://www.bavendamresearch.com/art0412.html> Online article - *Managing workloads can increase your productivity*
- <http://www.icaew.com/en/library/subject-gateways/business-management/strategy-and-planning/small-business-update/10-ways-to-prioritise-your-workload> The Institute of Chartered Accountants in England and Wales – Small Business Update – *10 Ways to...prioritise your workload*

# Unit 12: Researching and Analysing Data for Public Relations

Unit code:	H/504/0929
QCF Level 4:	BTEC Professional
Credit value:	6
Guided learning hours:	35

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## Unit aim

This unit provides learners with the skills to be able to agree a research project, plan and conduct research and present conclusions in a public relations context.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace. Observation, witness testimony, questioning, professional discussion, written and product evidence are all sources of evidence which can be used.

## Unit introduction

Public relations professionals use research skills for various purposes and they need to have the skills to design, implement and present the results of research within tight deadlines and for specific purposes.

In this unit learners will learn how to select suitable methods of research to meet specified objectives and then to plan and conduct research. Research methods include primary and secondary research and planning includes some elements of project planning methodology.

Learners will implement their research plans, collecting data using suitable methods, before analysing both qualitative and quantitative findings and drawing conclusions. They will also learn how to assess the validity of the results of their research.

Finally, learners will develop the skills to present their findings and conclusions to meet the needs of different audiences.

This is a practical unit based on work undertaken in the workplace and assessment is based on evidence produced in the workplace.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Be able to plan research to meet agreed objectives in a public relations context</p>	<p>1.1 Agree research objectives and resources with sponsor                      1.2 Determine research methods to meet objectives                      1.3 Draw up project plan for research with defined milestones and final outcomes</p>
<p>2 Be able to conduct research to meet agreed objectives in a public relations context</p>	<p>2.1 Conduct secondary research from appropriate sources to meet agreed public relations objectives                      2.2 Conduct primary research to meet agreed public relations objectives</p>
<p>3 Be able to analyse findings</p>	<p>3.1 Analyse quantitative data to address research objectives                      3.2 Analyse qualitative data to address research objectives                      3.3 Draw valid and reliable conclusions from research                      3.4 Identify limitations to validity of research</p>
<p>4 Be able to present conclusions of research for use in a public relations context</p>	<p>4.1 Present research findings using appropriate methods to meet audience needs                      4.2 Demonstrate compliance with constraints when presenting research conclusions</p>

## Unit content

### 1 Be able to plan research to meet agreed objectives in a public relations context

*Context of research:* e.g. evaluation of potential public relations client, to support bid for contract, on behalf of client, media monitoring; commissioning and briefing independent research

*Purposes of research:* e.g. gain media coverage, inform the creation of Thought Leadership programmes, evaluate media appeal, establish key stakeholder awareness of or attitudes to clients, determine levels of interaction about specific campaign

*Research objectives:* specific; agreed; resource limitations; validity requirements

*Methods of research:* primary, e.g. surveys, observations, focus groups, analysis of online traffic; secondary, e.g. statistics, reports of previous research; advantages and disadvantages of primary and secondary research; importance of cost effectiveness

*Project plan for research:* aims and objectives; activities; milestones; sponsor agreement (outcomes, milestones, reporting methods)

### 2 Be able to conduct research to meet agreed objectives in a public relations context

*Implement planned research:* pilot; communications with research sponsor and other stakeholders, e.g. team meetings, agreed reporting points, exception reporting; adjustments to plan; monitoring against objectives

*Collection of data:* accuracy; validity; security

### 3 Be able to analyse findings

*Quantitative findings:* statistical concepts (mean, mode, median); measures of dispersion

*Web-based data:* interpretation; validity; reliability; relevance

*Qualitative findings:* interpretation; validity; reliability; relevance

*Limitations:* importance of identifying limits of validity and relevance

*Creative uses of research:* exploitation of research; immediate; ongoing

### 4 Be able to present conclusions of research for use in a public relations context

*Methods:* meetings; presentations; spreadsheets; pitch for public relations contract; reports; stories to gain media coverage; speaker platforms

*Audience needs:* level of expertise; language; objectives; time constraints

*Constraints:* data protection; commercial sensitivity; limitations of validity of research

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following unit in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations	n/a

### Essential requirements

Learners need opportunities to undertake research projects within a public relations context. These opportunities need to encompass planning, implementing the plans, analysis of data and presenting the findings from the research. Research should be interpreted widely as including that for generating media coverage or as a basis for building Thought Leadership programmes.

### Delivery

As prior experience of research and the ability to use the mathematical concepts included in this unit are likely to vary considerably between learners, initial assessments and diagnostic testing will be particularly useful in designing individual learning plans.

This is a practical unit so some of the learning and assessment would usually take place as part of the learner's role in the workplace. However, many learners would benefit from some formal learning in an off-the-job situation, especially for underpinning knowledge such as research techniques, sample size and interpretation of data. The learning programme could include on-the-job elements such as learners acting as an assistant to colleagues undertaking a range of research projects. This would be enhanced by using a mentoring approach where the learner is encouraged to explore the reasons behind decisions made during each project and also to evaluate both process and results.

The type of research projects should be those that are part of the usual work in public relations such as establishing a starting point before starting a public relations campaign, finding out about target audiences in preparation for a campaign or measuring the effectiveness of an existing campaign. Over a period of time learners should have the opportunity to assist with all stages of research including receiving initial instructions and objectives, determining the types of research to be used, drawing up a simple project plan, undertaking the research, analysing data, drawing conclusions and presenting the results. Additionally, they should understand how to present research in a way that is appealing, when required, to the media, together with the ethics of using data in a responsible manner.

Care should be taken to ensure learners have opportunities to develop their skills using the range of methods of research indicated in the unit content. Learners can gradually take on more responsibility when undertaking research so that they are able to manage the whole process themselves.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Assessment should be through the practical application of skills in the workplace. Evidence can be collected through a paper-based or online portfolio. The assessor should design an individual assessment plan for each learner so that the learner's needs are met using opportunities provided by their employer. Whilst it is necessary for learners to demonstrate skills in using both primary and secondary research methods, the primary research could be on a small scale and the quantitative analysis could be based on secondary research sources.

Types of evidence could include personal statements from the learner, product evidence such as research plans, records of meetings and written reports, observation records written by the assessor, witness testimonies from workplace colleagues or managers, and professional discussions. If information is sensitive or there are other difficulties evidence could be retained in the workplace but referenced to the portfolio in accordance with competency-based assessment processes.

It is likely that learners will need to complete several research projects to produce sufficient evidence of competency and also to satisfy all the assessment criteria.

## Resources

### Book

Stacks D W – *Primer of Public Relations Research* (The Guildford Press, 2011)  
ISBN 978-593855956

### Website

[www.populus.co.uk](http://www.populus.co.uk)

Populus



# **Unit 13: Develop Working Relationships with Colleagues and Stakeholders**

Unit code: K/600/9661  
QCF Level 4: BTEC Professional  
Credit value: 4  
Guided learning hours: 20

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## **Unit aim**

This unit will help learners to develop effective working relationships with colleagues and stakeholders.

## **Competency unit assessment guidance**

This unit should be assessed predominantly in the workplace.

## **Unit introduction**

All successful public relations work is built on a foundation of integrated relationships between colleagues and stakeholders. This unit focuses on the importance of relationships, enabling learners to develop the skills and confidence to identify key relationships, how to manage them once initiated, and how to develop and sustain mutually respectful and trusting business relationships beyond a project's lifetime.

Learners will identify the value of stakeholders and engage in sufficient research and interaction to understand their roles, influence, aims and interests. Learners will have the opportunity to develop their own list of contacts, followed by a relationship-building plan that is closely integrated with self-analysis. Learners will engage with stakeholders and colleagues, contributing to meetings, projects, campaigns or events, to identify common goals, needs and interests. Line managers will support and encourage stakeholder and colleague engagement to ensure appropriate activities are carried out, and to build learner confidence. However, learner autonomy and initiative will be necessary.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Know how to identify stakeholders and their relevance to an organisation</p>	<p>1.1 Identify an organisation's stakeholders</p> <p>1.2 Evaluate the roles, responsibilities, interests and concerns of stakeholders</p> <p>1.3 Assess the importance of identified stakeholders</p>
<p>2 Understand how to establish working relationships with colleagues and stakeholders</p>	<p>2.1 Clarify how to agree a common sense of purpose with colleagues and stakeholders</p> <p>2.2 Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders</p>
<p>3 Be able to create an environment of trust and mutual respect with colleagues and stakeholders</p>	<p>3.1 Review and revise the needs and motivations of colleagues and stakeholders</p> <p>3.2 Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others</p>

## Unit content

### 1 Know how to identify stakeholders and their relevance to an organisation

*Public relations direct stakeholders:* colleagues including managers, other departments; investors/shareholders; customers (in-house teams); clients (direct reports, employees of client organisation); suppliers; key individuals, e.g. industry experts, journalists

*Stakeholder roles, responsibilities, interests and concerns:* corporate governance, e.g. identify common purpose, similarity of goals and priorities, mutual clients/customer base, resources, funds, time, knowledge, support that can be offered; conflict, e.g. inconsistent interests, power, rewards

*Stakeholder importance:* stakeholder influence, e.g. on campaign success or failure, the media, power of veto; stakeholder control, e.g. of access to resources, knowledge, skills; time and goal relevance, e.g. present, future, cyclical, temporary, long term

### 2 Understand how to establish working relationships with colleagues and stakeholders

*Agree common purpose:* identification of common purpose, e.g. objectives, teams, individuals, milestones, success criteria; share objectives; demonstrate respect for the other's role; demonstrate understanding of the wider strategic purpose; explain own role

*Create mutual trust and respect:* actions (self and others), e.g. deliver results, improve, listen, seek to understand, keep promises, correct errors; codes of conduct, e.g. maintain standards of confidentiality, personal conduct, conduct towards colleagues and clients; character traits, e.g. integrity, credibility, performance, loyalty, transparency, accountability, reliability, truthfulness, professionalism, courtesy

### 3 Be able to create an environment of trust and mutual respect with colleagues and stakeholders

*Review and revise needs and motivations:* corporate structure, e.g. hierarchy, chain-of-command, individual roles, company policy; mutual goals, e.g. immediate, long term, prospective, deadlines, reciprocal; communication channels, e.g. internal, external, group, individual, introduction, digital networking (social media); troubleshooting

*Demonstrate respectful interaction:* self-analysis, e.g. Belbin Self-Perception Inventory (SPI), conduct, presentation, body language; monitoring, e.g. troubleshooting, milestones, readiness (of individual or organisation); assessment, e.g. common strategy, implementation, follow-up; communication e.g. intention, perception, confidence; post-goal maintenance, e.g. routine contact, encourage feedback

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance at Work	Unit 2: Understanding Public Relations Unit 18: Understanding Client Relationships in Public Relations Unit 27: Negotiation and Influencing Unit 28: Develop, Maintain and Review Personal Networks	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop relationship-building skills and demonstrate relevant competence in the workplace. The unit links to *Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance at Work* and it may be useful to co-deliver the knowledge elements of building relationships in a public relations business environment.

For learning outcome 1, learners should focus on direct working stakeholders for the scope of this unit. Learners could create their own list of key stakeholders and colleagues (groups and individuals) within a defined project outcome as agreed with their line manager, such as colleagues and stakeholders relevant to a specific campaign or event. It is recommended that learners identify roles, responsibilities, goals and interests for each contact (group or individual) within the project. It is recommended that this list of contacts reflects current or near-future goals of the team or organisation the learner works in, as agreed with their line manager. It is also recommended that the line manager checks the list to ensure contacts are relevant and that their roles, responsibilities, goals and interests have been identified correctly.

Learning outcome 2 is concerned with learner conduct, self-analysis and assessment of the conduct of others within a public relations environment. Learning outcome 2 would benefit from focused research, communication and learner self-analysis to identify methods for gaining an understanding of how they are perceived, and their assessment of actions others must carry out before they gain the learner's trust and respect. Tutors could assist learners with an exercise in self-perception to help them identify the difference between how they perceive their own behaviour, and how colleagues may perceive the same behaviour. A profiling tool such as the Belbin Self-Perception Inventory (SPI) could provide useful

guidance. Sensitivity is recommended, as well as a pre-exercise brief from the tutor to help learners prepare possible outcomes.

Learners could agree with their line managers a minimum number of relationship-building actions that will also contribute towards an attainable goal, such as a relevant sub-project within a campaign or event. Actions could include meeting with colleagues or stakeholders to identify common objectives, or participation in planning a project or event to demonstrate listening and communication skills.

It is recommended that learners keep a record of all activities and summarise the outcomes to develop their own viable relationship-building plan.

As there is likely to be insufficient time within the unit for learners to demonstrate mutual conduct within a long-term relationship, it is recommended that learners are briefed on the essentials of maintaining relationships after their 'perceived usefulness' is concluded. This information can be built into a follow-up maintenance section of the relationship-building plan.

Due to the self-analysis nature of this learning outcome, it may be useful to brief learners on the unit content for learning outcome 3 at the outset of learning outcome 2, where a relationship plan will be used to gain feedback from colleagues, stakeholders and line managers. This would give learners the option to record confidential personal notes separately from the final plan. Learners may also wish to place elements of the relationship-building plan into a separate record, as agreed with the line manager, for example the follow-up maintenance section of the plan. It is advisable that the plan and its accompanying communication records are completed before learning outcome 3 is delivered.

Documented feedback and communication is the recommended way for learners to demonstrate interaction to satisfy learning outcome 3 and to enable sufficient analysis for assessment. Learning outcome 2 flows naturally into learning outcome 3, enabling learners and their line managers to build on the relationship-building plan to develop a practical feedback form. It is recommended that line managers include a minimum number of measureable criteria to show evidence of the learner acting with trust and respect for others in the workplace, as well as their ability to gain evidence of trust and respect from others. Suggested feedback criteria could include responding to requests or delegation, time management, assisting colleagues (proactively and reactively), accountability, and mutually beneficial communication.

## Assessment

This unit must be assessed in the workplace, and simulation for this unit is not permitted. This is a Management Standards Centre unit and therefore the MSC Assessment Strategy for Management and Leadership document must be followed; please see *Annexe F*.

Evidence will take a variety of forms including records of meetings and conversations, physical products of work including reports, plans and correspondence, professional discussion and questioning, and witness testimony

from line managers, peers and colleagues.

Assessment for learning outcome 1 could include learners completing their own list of stakeholders which they have identified themselves. Contacts in this list must be relevant to objectives set out by a line manager, and their roles, responsibilities, goals and interests identified correctly. Evidence of research and communication could be provided, for example copies of emails and meeting notes, or recordings of telephone conversations, which would then support evidence for learning outcome 3.

Assessment for learning outcome 2 could include learners making plans for building business relationships. Plans could include sufficient detail to evidence an understanding of mutual relationship building and to identify relationship 'lifetime'. Plans must show evidence of analysis and necessary revision within a specified number of objectives as agreed with a line manager, for example self-construct and troubleshooting. Plans should also include a proposed schedule for maintaining ongoing communication with contacts, with a minimum time projection range to be agreed with the line manager.

For learning outcome 3, learners could obtain recorded feedback of their relationship-building plans from a line manager, peers, colleagues and stakeholders. The feedback must show evidence of learner engagement with a minimum number of contacts and activities as determined by the line manager. The learner must then utilise the feedback to evaluate their relationship-building plans. Learners must show evidence of reviewing, assessing and making necessary revisions to their relationship-building plans. This does not need to be for a whole campaign or event, but should work from objectives cascaded down to the learner.

## Resources

### Books

Bourne L – *Stakeholder Relationship Management: 1* (Gower, 2009)

ISBN: 978-0566088643

Kay S – *Professionalism: The ABC for Success* (Professionalism Books, 2010)

ISBN: 978-0956540102

### Article

Dahl D – *How to Build Better Business Relationships* (Inc. Magazine, January 2011)

### Websites

[www.belbin.com/rte.asp?id=400](http://www.belbin.com/rte.asp?id=400)

Belbin Self-Perception Inventory (SPI)

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations (CIPR)

[www.inc.com/guides/201101/how-to-build-better-business-relationships.html](http://www.inc.com/guides/201101/how-to-build-better-business-relationships.html)

*Inc. Magazine* – relationship-building article

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association (PRCA)

# Unit 14: Career Development

Unit code:	R/503/2891
QCF Level 3:	BTEC Professional
Credit value:	2
Guided learning hours:	15

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## Unit aim

The aim of this unit is to give learners the knowledge and understanding needed to make career decisions, together with the skills to plan a career pathway.

## Unit introduction

The ability to define personal career objectives and identify career opportunities is an essential skill for a career in public relations. In doing so, learners are able to identify skills requirements for various specific public relations career paths – such as events, press office, or media relations – and plan and tailor their skills and career goals accordingly. This unit gives learners a practical pathway to identify such career goals and opportunities.

Learners will have the opportunity to identify careers information resources, professional bodies and training opportunities. The unit will also help learners to recognise national and international public relations trends and considerations that could affect their career search.

Learners will focus on self-evaluation and use the unit to highlight personal skills and attributes as they relate to a career in public relations. Learners will have the opportunity to take a skills audit to evaluate and strengthen their general workplace compatibility. They will then move on to public relations specific skills assessment to encourage exploration of a realistic public relations career pathway.

Learners will be able to identify relevant opportunities for career development for the next stage of their career and will develop skills to develop a personalised and realistic public relations career development plan.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to use careers information	1.1 Identify sources of career information to select for personal use 1.2 Outline careers pathways relevant to self 1.3 Describe emerging trends in ways of working that may impact on own career
2 Understand personal strengths and weaknesses relating to career choice	2.1 Undertake a skills audit to determine relevance and level of skills for a career choice 2.2 Describe new skills relevant to career choice
3 Be able to plan own career development	3.1 Identify options for work experience and training 3.2 Produce a career development plan to prepare for a specified career

## Unit content

### 1 Know how to use careers information

*Career information sources:* professional bodies, e.g. Chartered Institute of Public Relations (CIPR), Public Relations Consultants Association (PRCA), the Guild of Public Relations Practitioners; careers websites, e.g. Guardian Jobs, PRWeek Jobs, Brand Republic Jobs; advice websites; industry journals, e.g. PRWeek; libraries, e.g. access to careers advice books, directories; information, advice and guidance professionals, e.g. National Careers Service; PR specialists, e.g. recruitment consultants, current public relations practitioners

*Career pathways:* work and training pathways recognised by professional bodies, e.g. CIPR, PRCA; national and international considerations that could impact on the public relations sector, e.g. Eurozone developments, recession; industry structure, e.g. in-house teams, agencies, public sector, charities, government, integrated communications; sectors, e.g. entertainment, media, healthcare, financial, technology, business to business, public affairs

*Emerging trends:* national and international trends recognised by development bodies, e.g. the European Public Relations Education and Research Association (EUPRERA); flexible working, e.g. home working, remote working; self-employment, e.g. consultancy, freelance, temporary, contract; international options; social networking; blogging; webinars

### 2 Understand personal strengths and weaknesses relating to career choice

*Personal skills audit:* skills tests, e.g. National Careers Service Skills Health Check; general skills self-assessment, e.g. problem solving, decision making, flexibility, adaptability; transferable skills self-assessment, e.g. time management, team working, deadlines and workload prioritisation, communication skills, digital and social media skills, confidence with presentations and public speaking, ability to conduct self professionally, confidence with networking; self-motivation; autonomous working skills; appraisals, e.g. monthly, quarterly, annually, project-specific; colleagues feedback

*Relevant personal attributes:* current or previous experience, e.g. work, voluntary, work-based training; qualifications, e.g. education, training; merit-based recognition, e.g. awards, tutor, employer or customer recommendation; transferable work skills, e.g. meeting deadlines, meeting work targets, fulfilling job or training expectations; transferable personal interest skills, e.g. hobbies, personal projects, awareness of current events, interest in trends and new communication tools

### 3 Be able to plan own career development

*Work experience:* experience of the working environment through, e.g. apprenticeships, work placements, agency contracts, secondment, shadowing, voluntary, internships

*Types of training:* qualification-based, e.g. apprenticeships, further education, higher education; professional body training schemes, e.g. CIPR, PRCA; employer-based training programmes, e.g. professional development schemes, internal training

*Career development plan:* establish a clear career strategy, e.g. realistic expectations, determine goals, set priorities, decide attainable actions, utilise resources, signpost progress, pathway review; identify job roles in career path, e.g. junior account executive, account executive, account manager; identify skills required at different levels in career path, e.g. numeracy, IT, literacy, digital communication, project planning, research, data and analysis, people management, crisis management, reputation strategy

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 28: Develop, Maintain and Review Personal Networks	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This unit concentrates on the personal skills attributes and career needs of learners. A flexible approach, utilising a variety of resources to guide learners towards their career aspirations, is recommended. As this unit also focuses on learners' strengths and weaknesses, a sensitive and confidential approach is essential.

It is recommended that tutors provide an overview of each learning outcome at the beginning of the unit. This will give learners a context for understanding that each learning outcome is an essential step towards planning realistic future career pathways in public relations.

Learning outcome 1 could be delivered through group and individual work and discussions. This could include resource searches and discussions, for example reviewing professional journals and websites, including *PRWeek Jobs*, the Chartered Institute of Public Relations (CIPR) and Public Relations Consultants Association (PRCA). Research and discussion of public relations job descriptions, typical public relations career progression as defined by professional bodies, and types of training available to aspiring public relations practitioners, could help learners to understand the career options and resources available to them. An overview group discussion of emerging trends in public relations can be supported by researching UK national bodies, such as the CIPR and PRCA websites, as well as international trends recognised by development bodies such as The European Public Relations Education and Research Association (EUPRERA).

Delivery of learning outcomes 1 and 2 could benefit from interaction with a variety of public relations professionals, either visiting or within the company, to discuss specific skills required for a range of career pathways, providing insights into emerging trends and flexible approaches to a career in public relations.

To achieve learning outcome 3, learners will need to have completed a thorough self-assessment and career research to identify both their specified career and the skills they will need to progress professionally. Learners could take part in group discussions to share their personal work experience and training history, to help them recognise work experience or training they can apply to their personal career plan. Continued consultation and mentoring from public relations professionals is

recommended to give learners guidance on developing a viable career development plan. Learners can build on a CV to formulate a career development plan that is relevant to their specified career, with details of specific skills for chosen pathways, such as project planning and crisis management for events roles; digital communication, copywriting or proofreading for press, media and communications roles; or research, analysis and IT literacy for campaigns or digital communications roles.

## Assessment

For 1.1, learners could collate a list of resources that they feel are beneficial to their personal career aims. For 1.2, the resources from 1.1 should be applied to create an outline of a career pathway relevant to the learner. For 1.3, learners should identify public relations trends that could impact on their career path, and describe how each trend affects their chosen career. For example, a learner who is interested in digital account management should consider trends in social networking or blogging.

For 2.1, learners should provide evidence that they have developed a personal skills audit. For 2.2, learners must describe the general and transferable skills they will need to develop for their chosen career choice.

For 3.1, learners need to identify which options they could pursue and details of how they would do so, in terms of wider work experience and training beyond the apprenticeship. For 3.2, learners must produce their own practical career plan that is suitably detailed to identify their specific career aims, highlighting their strengths and areas for development. A learner's career aims must be clear and obvious. For example, if a learner chooses a path towards a career in events management, their career plan should show evidence of research into the events sector of public relations, with evidence of consultation with events managers. The learner's career plan must demonstrate the relevant use of resources, realistic actions and obvious signposts to mark career progress. The plan should have a sufficiently projected timespan, as agreed with the employer or assessor, to mark the learner's progression towards their future career aims within the company and beyond.

## Resources

### Books

Kroth M and McKay C – *Career Development Basics* (ASTD Press, 2009)  
ISBN 978-1562865467

Tymorek S – *Advertising and Public Relations* (Career Launcher) *1st Edition*  
(Checkmark Books, 2010) ISBN 978-0816079834

### Journal

*PRWeek* (Haymarket Media Group)

**Websites**

<a href="http://www.cipr.co.uk">www.cipr.co.uk</a>	Chartered Institute of Public Relations (CIPR)
<a href="http://www.cipr.co.uk/content/careers/careers-advice">www.cipr.co.uk/content/careers/careers-advice</a> <a href="http://www.cipr.co.uk/content/careers-cpd/careers-pr/day-day">www.cipr.co.uk/content/careers-cpd/careers-pr/day-day</a>	CIPR - overview of skills and attributes required for PR professionals
<a href="http://www.euprera.org">www.euprera.org</a>	European Public Relations Education and Research Association
<a href="http://www.guardian.co.uk/jobs">www.guardian.co.uk/jobs</a>	Guardian Newspaper Jobs
<a href="http://www.guardian.co.uk/media/marketingandpr">www.guardian.co.uk/media/marketingandpr</a>	Guardian Media Marketing and PR News
<a href="http://jobs.brandrepublic.com">http://jobs.brandrepublic.com</a>	Brand Republic Jobs
<a href="https://nationalcareersservice.direct.gov.uk/Pages/Home.aspx/home.aspx">https://nationalcareersservice.direct.gov.uk/Pages/Home.aspx/home.aspx</a>	National Careers Service (Advice)
<a href="https://nationalcareersservice.direct.gov.uk/tools/skillshealthcheck/Pages/default.aspx">https://nationalcareersservice.direct.gov.uk/tools/skillshealthcheck/Pages/default.aspx</a>	National Careers Service (Skills Health Check)
<a href="http://www.prca.org.uk">www.prca.org.uk</a>	Public Relations Consultants Association (PRCA)
<a href="http://www.prweek.com/uk">www.prweek.com/uk</a>	<i>PRWeek</i> (online journal)
<a href="http://www.prweekjobs.co.uk">www.prweekjobs.co.uk</a>	PRWeek Jobs



# Unit 15: Understanding Public Relations Work within Public Affairs

Unit code:	Y/504/0930
QCF Level 4:	BTEC Professional
Credit value:	5
Guided learning hours:	40

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## Unit aim

This unit provides the learner with an understanding of the work that public relations professionals undertake within public affairs.

## Unit introduction

The relationship between public relations and public affairs is very close. Public affairs affect all our lives and many working within public relations have the opportunity to directly influence decision-makers. Learners will cover the roles of those working in both sectors in order to understand this relationship.

Knowledge of 'who does what and why' within the public affairs sector is vital to those trying to influence decisions. Learners will cover the key sources of information relating to public affairs so that they can establish the background knowledge and understanding that is needed before direct lobbying initiatives are undertaken.

An understanding of the processes, roles and structures of all levels of government is also crucial to effective working within this sector for public relations professionals. Learners will cover three levels of government – local, national and international – as they relate to public relations work.

Lobbying is a major aspect of working within the public affairs sector. Learners will cover the ethical requirements of lobbyists and how organisations plan their lobbying strategies.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the relationship between public relations and public affairs professionals</p>	<p>1.1 Discuss the role of public affairs professionals</p> <p>1.2 Compare the roles of public relations and public affairs professionals</p> <p>1.3 Explain how public relations and public affairs professionals work together</p>
<p>2 Be able to select key sources of public affairs information</p>	<p>2.1 Select relevant sources of information for given public affairs scenarios</p> <p>2.2 Justify the selection of key sources of information for given public affairs scenarios</p>
<p>3 Understand local, national and international governmental processes, roles and structures relating to public relations work</p>	<p>3.1 Examine, using examples, local government processes, roles and structures in relation to the work of public relations practitioners</p> <p>3.2 Examine, using examples, national and devolved government processes, roles and structures in relation to the work of public relations practitioners</p> <p>3.3 Examine, using examples, international government processes, roles and structures in relation to the work of public relations practitioners</p>
<p>4 Understand the role of lobbying within an ethical framework</p>	<p>4.1 Assess the need for an ethical framework for lobbying</p> <p>4.2 Plan a public affairs lobbying strategy for a given public relations scenario</p> <p>4.3 Justify a public affairs lobbying strategy for a given public relations scenario</p>

## Unit content

### 1 Understand the relationship between public relations and public affairs professionals

*Public affairs:* definition of public affairs; reasons why organisations require and manage relationships with stakeholders, e.g. to explain organisation's policies, provide statistical and factual information, to lobby or campaign on issues which could impact on the organisation and its service users; types of stakeholder; organisational structures and roles to manage public affairs activities; public affairs job titles, roles and responsibilities; organisational policies relating to public affairs

*Public relations:* definition of public relations; reasons why organisations require and manage relationships with stakeholders, e.g. to maintain and manage the organisation's reputation, understanding and goodwill with stakeholders and the general public, to achieve a campaign objective; types of stakeholder; organisational structures and roles to manage public relations activities; organisational policies relating to public relations

### 2 Be able to select key sources of public affairs information

*Key sources of information:* e.g. relevant publications, books, journals, magazines, newspapers, electronic methods (to include websites, television, radio), social media, networking, use of Hansard, use of Vacher's Quarterly, use of the Civil Service Yearbook, green and white papers, think tank reports, Select Committee reports

### 3 Understand local, national and international governmental processes, roles and structures relating to public relations work

*The political environment:* political 'pyramids', e.g. European Union (EU), UK government, devolved national governments, local councils, parish councils

*Local government:* structures of local government, relevant departments and offices, e.g. local councils, parish councils; roles and responsibilities of elected and non-elected officers and staff; how local government works and decisions are made; how lobbying works at a local level; where power lies; codes of conduct for local government

*Devolved government and assemblies:* structure, e.g. Scottish government and parliament, Wales and Northern Ireland Assemblies; devolved or transferred powers; roles and responsibilities of elected representatives and non-elected officials; codes of conduct

*National government:* structure of parliament, relevant departments and offices; roles and responsibilities of Ministers, Members of Parliament (MPs), Peers, staff and aides; other key players and influencers, e.g. Select Committee members; how government works and decisions are made; how politicians get their ideas to create new laws or change existing laws, e.g. policy units, campaigners and think tanks; how laws are created and changed (to include Public and Private Bills); where power lies; political codes of conduct, e.g. Register of Members' Financial Interests, the Ministerial Code; effects of devolution to the EU and devolved administrations

*International government:* structures of different types of parliamentary system, relevant departments and offices, e.g. EU, United Nations (UN); roles and responsibilities of elected and non-elected members, officers and aides; other key players and influencers; how governments work and decisions are made; where power lies

#### **4 Understand the process of lobbying within an ethical framework**

*Lobbying:* definition of lobbying; reasons for working within an ethical framework; proactive and reactive reasons for lobbying within public affairs, e.g. establishing and maintaining relationships with political decision-makers, awareness of the organisation; types of communication and campaigning strategies; direct and indirect methods of lobbying; reasons for and requirements of organisational strategies relating to lobbying (campaign/communication strategies); importance of teamwork in lobbying activities; best practice in developing initiatives to identify and work with parliamentarians and their aides; importance of researching political agendas; use of non-governmental organisations within lobbying strategies; importance of the media in lobbying; importance of attending relevant events and networking, e.g. political party conferences, constituency meetings and local community events; methods of producing materials for lobbying activities, e.g. briefing notes for speeches, relevant facts and figures, case study materials, surveys and polls (methods, results and analysis)

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 28: Develop, Maintain and Review Personal Networks	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, site visits, project work, research using the internet and/or library resources, and the use of personal and/or industrial experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as local or national politicians and specific public relations professionals.

Delivery of learning outcome 1 could be delivered using real-life case studies. It could be combined in part with the delivery of *Unit 2: Understanding Public Relations*. A public affairs professional could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

For learning outcome 2, it is important that the tutor provides a theoretical background to the range of the key sources of information public affairs professionals use. Delivery should be as interactive as possible with learners using the resources in relation to real-life case studies.

For learning outcome 3, it is important that the tutor gives a general overview of local, national and international government processes, roles and structures. This must be delivered in relation to the role of public relations professionals and must cover current issues. The international element must include coverage of the EU and the UN. Politicians and their aides, from different levels of government, could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

For learning outcome 4, tutors could cover the theory of lobbying using as much real-life case study material as possible. It is suggested that that a lobbyist is invited to talk to learners about the type of work they do and to, importantly, answer learner questions. A public affairs professional could also be invited to talk about the strategies that their organisation employs in relation to lobbying.

Learners should be required to prepare a range of pertinent questions in advance of such talks.

## Assessment

Assessment needs to be based on carefully selected and well developed real-life case studies. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where it is appropriate.

For learning outcome 1, it is important that the learners show a clear understanding of the differences between the role of public relations practitioners and public affairs practitioners. They should include adequate examples which show an in-depth understanding of the differences between the roles.

For learning outcome 2, learners should be given a minimum of at least two realistic public affairs scenarios to work to. The sources of information used in evidence must be relevant and in sufficient number to show that a wide-ranging briefing could be obtained from them. Learners must justify their choices with in-depth reasoning.

For learning outcome 3, learners must cover each of the assessment criteria with breadth and depth. Examples must be current and relevant.

For learning outcome 4 learners must assess, in-depth, the need for an ethical framework within the lobbying sector. They must also plan and justify a public affairs lobbying strategy for a given public relations scenario. This may be related directly to the organisation that the learner works for or is aware of. The scenario must be agreed with the tutor in advance or given by the tutor to the learner. It must relate to a current issue.

## Resources

### Books

Morris T and Goldsworthy S – *Today: The Authoritative Guide to Public Relations* (Palgrave Macmillan, 2011) ISBN 9780230240094

Rogers R and Walters R – *How Parliament Works* (Longman, 2006)  
ISBN 9781405832557

Tench R and Yeomans L – *Exploring Public Relations* (Financial Times/Prentice Hall, 2006) ISBN 9780273688891

Thomas S and John S – *Public Affairs in Practice: A Practical Guide to Lobbying (PR in Practice)* (Kogan Page, 2006) ISBN 9780749444723

Wilson D and Game C – *Local Government in the United Kingdom* (Palgrave Macmillan, 2011) ISBN 9780230246393

Zetter L – *Lobbying: The Art of Political Persuasion* (Harriman House Publishing, 2008) ISBN 9781905641697

**Websites**

<a href="http://www.bbc.co.uk/journalism">www.bbc.co.uk/journalism</a>	The BBC's college of journalism
<a href="http://www.cipr.co.uk">www.cipr.co.uk</a>	Chartered Institute of Public Relations (CIPR)
<a href="http://www.data.gov.uk">www.data.gov.uk</a>	Civil Service Yearbook
<a href="http://www.direct.gov.uk">www.direct.gov.uk</a>	United Kingdom Government
<a href="http://www.dodonline.co.uk">www.dodonline.co.uk</a>	Vacher's Quarterly
<a href="http://www.europa.eu">www.europa.eu</a>	European Union
<a href="http://www.guardian.co.uk">www.guardian.co.uk</a>	Guardian newspaper
<a href="http://www.niassembly.gov.uk">www.niassembly.gov.uk</a>	Northern Ireland Assembly
<a href="http://www.parliament.uk">www.parliament.uk</a>	UK Parliament
<a href="http://www.publicaffairsnetworking.com">www.publicaffairsnetworking.com</a>	Public Affairs Networking
<a href="http://www.prca.org.uk">www.prca.org.uk</a>	Public Relations Consultants Association (PRCA)
<a href="http://www.scottish.parliament.uk">www.scottish.parliament.uk</a>	Scottish Parliament
<a href="http://www.theyworkforyou.com">www.theyworkforyou.com</a>	They work for you
<a href="http://www.un.org">www.un.org</a>	United Nations
<a href="http://www.wales.gov.uk">www.wales.gov.uk</a>	Welsh Assembly



# **Unit 16: Understanding the Use of Public Relations in Issues and Crisis Management**

Unit code: D/504/0931  
QCF Level 5: BTEC Professional  
Credit value: 4  
Guided learning hours: 24

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## **Unit aim**

This unit provides the learner with an understanding of the work that public relations professionals do to manage issues and crises.

## **Unit introduction**

Crises are an ever-present risk to individuals and organisations and come in many guises from high profile accidents to product recall. They can have devastating effects ranging from loss of revenue to loss of reputation. Learners will cover the importance of identifying and managing issues to prevent them escalating into a crisis.

Public relations professionals are an essential part of the process of managing a crisis to reduce the impact and potential damage. Learners will cover the issue of what crises are, how plans are used to prepare for the management of crises and the strategies and tactics that public relations professionals use to manage communications during the event and to protect and promote reputation during and following the event.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the expressions 'an issue' and 'a crisis' in public relations terms</p>	<p>1.1 Explain, using examples, what constitutes 'an issue' in public relations</p> <p>1.2 Explain, using examples, what constitutes 'a crisis' in public relations</p> <p>1.3 Analyse the relationship between an issue and a crisis, identifying tipping points</p> <p>1.4 Analyse, using examples, the four stages of a crisis relevant to public relations</p>
<p>2 Understand how public relations professionals manage issues to seek to avert a crisis</p>	<p>2.1 Explain how to monitor media channels to identify issues</p> <p>2.2 Discuss processes used to escalate identified issues where appropriate</p> <p>2.3 Analyse public relations tactics used to manage different issues</p>
<p>3 Understand public relations crisis management</p>	<p>3.1 Evaluate the importance to an organisation of public relations crisis management planning</p> <p>3.2 Assess, using examples, public relations strategies in the management of crises</p> <p>3.3 Analyse, using examples, the role of social media monitoring in crisis management</p>

## Unit content

### 1 Understand the expressions 'an issue' and 'a crisis' in public relations terms

*Public relations issues:* definition of an issue; types of issues; relationship with crisis management, e.g. 'tipping point'

*Public relations crisis:* definition of a crisis (event/series of events that creates a situation which results in loss/potential risk of business or reputation); types of crisis (predictable and quantifiable, unexpected and unwelcome); the four stages of a crisis (breaking news stage 'the golden hour', unfolding crisis stage, blame stage, fallout/resolution stage 'the inquiry'); impacts of crises; reasons why public relations professionals are involved with helping to manage crises

### 2 Understand how public relations professionals manage issues to seek to avert a crisis

*Issues management:* monitoring media channels; identifying an issue or potential issue; escalation of issues, e.g. reporting structure, when appropriate to escalate; communication (internal, external); tactics used to manage issues, e.g. holding statements, online engagement with Twitter and forums, dealing with hate sites/spoof sites

### 3 Understand public relations crisis management

*Crisis management planning:* reasons for; aims and objectives of crisis management plans; types of crisis management plan; methods used to create crisis management plans; risk analysis; evaluation of crisis management plans; review of crisis management plans; contingency plans; scenario planning, e.g. 'what ifs'; use of audits; damage limitation; critical personnel, e.g. identifying crisis management team, key personnel; crisis resolution; use of crisis simulation

*Public relations crisis management strategies:* strategies to respond to all types of media; significance of media training for crisis management; internal and external lines of communication; tactics used to manage crises, e.g. holding statements, online engagement with Twitter and forums, dealing with hate sites/spoof sites, press conferences, media briefings; monitoring of social media networks and forums, e.g. use of Twitter hashtags; checklists for signs of crisis developing; timelines; what not to do; types of response to crises; positive public relations crisis management outcomes; negative public relations crisis management outcomes; importance of spokesperson, e.g. role to represent organisation/individual during a crisis, adequate briefing, interview techniques, key messaging concepts

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 5: Understanding the Media Landscape Unit 7: Communicating Effectively in Public Relations Unit 8: Pitching Public Relations Stories to the Media	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, office and site visits, project work, research using the internet and/or library resources, and the use of personal and/or professional experience.

Delivery should revolve around real-life situations and the detailed study of up-to-date and pertinent case studies which show best and worst practice in crisis planning and management. Centres are encouraged to organise talks from key stakeholders such as employers and crisis management specialists. If opportunities arise within their working environment it will be beneficial for learners to look at existing crisis management plans and be involved in any table-top crisis planning sessions the company holds.

Learning outcomes 1 and 2 could be delivered using real-life case studies so learners understand the concept of a crisis in public relations terms and how this differs from issues management and also for them to explore examples of good practice in crisis management planning. It could be combined in part with the delivery of *Unit 2: Understanding Public Relations* and *Unit 5: Understanding the Media Landscape*. An employee who has undertaken a crisis management role could be invited to talk to learners about the type of work they do highlighting lessons learned as well as successes. Learners should be required to prepare a range of pertinent questions in advance of such a talk. It is important that learners understand each of the four stages of a crisis and how the tone and pace of the activity and challenges change between the stages.

For learning outcome 3, it is important that the tutor gives a general overview of public relations strategies used to help manage crises using real-life examples. This must be delivered in relation to the role of public relations professionals and must cover current issues. A public relations professional with experience in crisis management could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

## Assessment

Assessment needs to be based on carefully selected and well-developed real-life case studies. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

For learning outcome 1, it is important that learners show a clear, in-depth understanding of crises and how public relations participate in their management.

For learning outcome 2, learners should evaluate the importance of crisis management planning to an organisation. Examples must be relevant and in sufficient number to display an in-depth understanding.

For learning outcome 3, learners must cover each of the assessment criteria with breadth and depth. Examples must be current and relevant.

## Resources

### Books

Bernstein A B and Rakowitz C – *Emergency Public Relations: Crisis Management in a 3.0 World* (Xlibris Corporation, 2012) ISBN 978-1469159539

Phillips D and Young P – *Online Public Relations: A Practical Guide to Developing an Online Strategy in the World of Social Media* (Kogan Page, 2009) ISBN 978-0749449681

Regester M and Larkin J – *Risk Issues and Crisis Management in Public Relations* (Kogan Page, 2008) ISBN 978-0749451073

Tench R and Yeomans L – *Exploring Public Relations, 2nd edition* (FT Prentice Hall, 2009) ISBN 978-0273715948

Theaker A – *The Public Relations Handbook* (Routledge, 2011) ISBN 978-0415598149

### Website

[www.prweek.com/uk](http://www.prweek.com/uk)

*PRWeek*



# Unit 17: Understanding How to Win New Public Relations Business

Unit code:	H/504/0932
QCF Level 4:	BTEC Professional
Credit value:	3
Guided learning hours:	20

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## Unit aim

This unit provides the learner with an understanding of the activities used by public relations professionals to win new business.

## Unit introduction

Attracting new clients and their business is essential for economic survival. Each new client requires individual attention and a dedicated strategy. Successfully winning new business should not only benefit the organisation but should also benefit the employee in terms of their professional development and potential progression.

Learners will cover the activities public relations professionals use to fulfil strategies to win new business for themselves or for their organisation. Knowing how organisations work is an essential prerequisite for success. This is particularly true when related to the organisation that is being targeted for new business.

Learners will cover how organisations work in relation to their processes for procuring the services of public relations professionals. They will learn to understand the importance of good business relationships and reputations in public relations work. Finally, they will cover the requirements for making a successful pitch to win new public relations business.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the importance of good business relationships and reputations in public relations work</p>	<p>1.1 Evaluate the importance of a good reputation in public relations work</p> <p>1.2 Discuss the process of networking in relation to gaining new public relations business</p> <p>1.3 Analyse the importance of good business relationships to gaining new public relations contracts</p>
<p>2 Understand organisational processes for procuring the services of public relations agencies</p>	<p>2.1 Analyse the structure of an organisation to identify staff who play a role in contracting new public relations services</p> <p>2.2 Analyse an organisation's policies relating to the procurement of new public relations services</p>
<p>3 Understand how to win new public relations business</p>	<p>3.1 Discuss activities required to successfully identify new business opportunities</p> <p>3.2 Explain how to develop a strategy, from inception to pitch, for a given scenario relating to obtaining new public relations business</p> <p>3.3 Analyse the importance of preparation before developing a pitch for new business</p> <p>3.4 Evaluate how successful pitches were in obtaining new public relations business</p>

## Unit content

### 1 Understand the importance of good business relationships and reputations in public relations work

*Business relationships and reputations:* types of organisational public relations strategies; media organisations (interests, background, type); contacts and their interests, previous stories within media organisations; organisation directories; methods, advantages and disadvantages of self-advertising and promotion to include websites; importance of networking and regular contact; importance of testimonials from existing clients; importance of professional approach/conduct, e.g. good behaviour, manners, timekeeping, professional presentation, preparation for meetings; knowledge of own business position and capability to carry out the work; knowledge of competitor work and abilities; importance of working within budgets and to time

### 2 Understand organisational processes for procuring the services of public relations agencies

*Organisations and processes:* structures; staff roles and responsibilities; policies; communication strategies; media strategy; procurement and tendering; financial processes; campaign costing; legal considerations and contracts to include briefing documents, confidentiality, equal opportunities, corporate social responsibility, environmental; networking; interviewing and selection (long lists, shortlists); code of conduct; sources of information relating to organisation and its aims, objectives and focus; target audiences; in-house and external organisations; review and evaluation of processes

### 3 Understand how to win new public relations business

*Preparation:* importance of researching (marketplace, target organisation); use of initiative; identify how you can help the client; identify opportunities, e.g. by telephone, networking, media awareness

*Pitching:* pitching types and opportunities, e.g. need to be invited to pitch, 35-second pitch, elevator message; types of strategy (advantages, disadvantages); types of tactic (advantages, disadvantages); playing to your strengths; available resources; criteria used in selection of strategies and tactics, e.g. time, personnel, resources, costs, strengths; methods used to develop pitch; methods used to develop presentations; team pitching (each person has a defined and practised role); methods used to follow up post-pitch; evaluation (lessons learned, successful and unsuccessful strategies, obtaining and using feedback)

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 10: Delivering Professional Presentations	Unit 2: Understanding Public Relations Unit 5: Understanding the Media Landscape Unit 8: Pitching Public Relations Stories to the Media Unit 12: Researching and Analysing Data for Public Relations Unit 15: Understanding Public Relations Work within Public Affairs Unit 18: Understanding Client Relationships in Public Relations Unit 27: Negotiation and Influencing Unit 28: Develop, Maintain and Review Personal Networks	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, office visits, project work, research using the internet and/or library resources, and the use of personal and/or professional experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as specific industry professionals. It is important that learners are given the opportunity to review different examples of the brief that is given to public relations professionals by those seeking to contract their services, and a variety of good practice examples of pitch documents and presentation materials.

Learning outcome 1 could be delivered using simulated or real-life case studies or real-life situations. It could be combined in part with delivery of *Unit 2: Understanding Public Relations*, *Unit 15: Understanding Public Relations Work within Public Affairs*, *Unit 5: Understanding the Media Landscape*, *Unit 18: Understanding Client Relationships in Public Relations*, *Unit 12: Researching and Analysing Data for Public Relations* and *Unit 8: Pitching Public Relations Stories to the Media*. It is suggested that a public relations professional with responsibility for winning new business could be invited to talk to learners about the type of strategies and tactics they use and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

Learning outcome 2, could be delivered using simulated or real-life case studies or real-life situations. It could be combined in part with delivery of *Unit 2: Understanding Public Relations*, *Unit 18: Understanding Client Relationships in Public Relations* and *Unit 5: Understanding the Media Landscape*. A public relations professional could be invited to talk to learners about the importance of good business relationships and reputations in public relations work and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

Learning outcome 3 could be delivered using simulated or real-life situations. A public relations professional who specialises in pitching stories could be invited to talk to learners about how they obtain and respond to feedback and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

## Assessment

Assessment needs to be based on carefully selected and well-developed simulated or real-life situations. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

For learning outcome 1, it is important that learners show a clear understanding of the structure of an organisation to identify the staff who play a role in contracting new public relations business. They should include adequate examples which show an in-depth analysis of the roles the staff play in the process. Learners are also required to analyse an organisation's policies relating to the procurement of new public relations business. This should be in depth and broad ranging from the inception of the requirement for the work to be done to the review and evaluation processes.

For learning outcome 2, learners are required to discuss the process of networking in relation to gaining new public relations business; to evaluate the importance of a good reputation in public relations work; and to analyse the importance of good business relationships in gaining new public relations contracts. Evidence should include relevant examples and show an in-depth understanding.

For learning outcome 3, learners must analyse, in detail, the importance of researching the target organisation before developing the pitch for new public relations business. They must also develop a strategy, from inception to pitch, for a given scenario relating to obtaining new public relations business. This may be related directly to the organisation that the learner works for or is aware of. The scenario must be agreed with the tutor in advance or given by the tutor to learners and it must relate to a current issue. The strategy produced by the learner must be appropriate for the given scenario. Finally, learners must evaluate their pitches to

ascertain how successful they were in following given strategies designed to obtain new public relations business.

## Resources

### Books

Foster J – *Effective Writing Skills for Public Relations* (Kogan Page, 2008)  
ISBN 978-0749451097

Green A – *Effective Communication Skills for Public Relations* (Kogan Page, 2006)  
ISBN 978-0749444075

Kleiman J – *Be Your Own Best Publicist: How to Use PR Techniques to Get Noticed, Hired, and Rewarded at Work* (Career Press, 2011) ISBN 978-1601631480

Theaker A – *The Public Relations Handbook* (Routledge, 2011)  
ISBN 978-0415598149

Wilcox D L and Reber B H – *Public Relations Writing and Media Techniques*  
(Pearson, 2012) ISBN 978-0205873340

### Websites

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations  
(CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association  
(PRCA)

# **Unit 18: Understanding Client Relationships in Public Relations**

Unit code: K/504/0933  
QCF Level 4: BTEC Professional  
Credit value: 4  
Guided learning hours: 25

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## **Unit aim**

This unit provides the learner with an understanding of how the client-agency/in-house relationship should be managed by public relations professionals.

## **Unit introduction**

The relationship between the public relations professional and their client should be mutually beneficial. Both parties should be keen to establish and maintain a relationship that works and achieves the original outcomes satisfactorily. This relates to relationships that are in-house and those that are required for external clients.

Learners will cover the establishment and maintenance of these professional working relationships. They will also look at how conflicts, should they arise, can be resolved.

Finally, learners will cover the methods used to assess the working relationships with in-house and external public relations clients.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand how to have professional working relationships with public relations clients</p>	<p>1.1 Assess methods used to establish professional working relationships with public relations clients</p> <p>1.2 Assess methods used to maintain professional working relationships with public relations clients</p>
<p>2 Understand how to resolve conflicts with public relations clients</p>	<p>2.1 Analyse the potential for conflict with clients in a given public relations scenario</p> <p>2.2 Evaluate approaches that could be used to resolve potential conflicts with clients in a given public relations scenario</p>
<p>3 Understand how to assess working relationships with public relations clients</p>	<p>3.1 Discuss methods which can be used to assess working relationships with public relations clients</p> <p>3.2 Evaluate methods of accurately recording work done for public relations clients</p>

## Unit content

### 1 Understand how to have professional working relationships with public relations clients

*Establishing working relationships:* types of client to include in-house and external; project/contract aims and objectives; briefing documents; legal requirements; ethical standards; codes of conduct; expectations of the client; critical, measurable achievement points; roles and responsibilities of all staff involved from junior to senior levels; establishing teams as necessary; professional behaviour; lines of authority and communication; methods of establishing the modus operandi for the project; confidentiality; styles of communication; consultancy cycle

*Maintaining working relationships:* regular meetings; roles and responsibilities of senior to junior staff; record keeping; professional behaviour; methods used to provide regular feedback on the project; confidentiality; methods used to integrate consultants with the client's team; planning time requirements; importance of agreeing clear action points from meetings, conversations and other forms of contact

### 2 Understand how to resolve conflicts with public relations clients

*Conflict resolution:* possible reasons for conflict, e.g. personality clashes, missed timelines, not meeting expectations, overspending, missed deadlines, missed payment, lack of mutual trust and respect, incompetence; methods used to resolve conflict; use of third parties; recommendations following resolution of conflict to improve the relationship; develop knowledge of the client's business

### 3 Understand how to assess working relationships with public relations clients

*Assessing working relationships:* methods used to record work carried out; methods used to assess working relationships (advantages, disadvantages); review and evaluation techniques; methods used to deliver feedback to clients

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 1: Principles of Personal Responsibilities and How to Develop and Evaluate Own Performance at Work	Unit 2: Understanding Public Relations Unit 17: Understanding How to Win New Public Relations Business Unit 27: Negotiation and Influencing	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include lectures, seminars, workshops, presentations, office visits, project work, research using the internet and/or library resources as well as drawing on learners' workplace experiences.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as specific industry professionals and their clients. Examples of action points written up from a monthly strategy meeting would be useful for learners.

A public relations professional could be invited to talk to learners about the type of work they do and to, importantly, answer learner questions. Learners should be required to prepare a range of pertinent questions in advance of such a talk.

Learning outcome 1 could be delivered using real-life case studies. It could be combined in part with delivery of *Unit 2: Understanding Public Relations*.

For learning outcome 2, it is important that the tutor provides a theoretical background to the methods used to resolve conflicts with public relations clients. Delivery should be as interactive as possible using real-life case studies.

For learning outcome 3, it is important that the tutor gives a general overview of the methods used to record work and assess working relationships with public relations clients, using real-life case studies and/or scenarios.

## Assessment

Assessment needs to be based on carefully selected and well-developed real-life case studies. Learners should be encouraged to use their own organisation's activities as a basis for their evidence where appropriate.

For learning outcome 1, learners must assess methods used to establish and maintain professional working relationships with public relations clients. Evidence should show an in-depth understanding and broad range. Learners should include current, relevant examples where appropriate.

For learning outcome 2, learners must analyse the potential for conflict with clients in a given public relations scenario and evaluate approaches that could be used to resolve potential conflicts with clients. The scenario(s) may be related directly to the organisation that the learner works for or is aware of. The scenario(s) must be agreed with the tutor in advance or given by the tutor to learners.

For learning outcome 3, learners must evaluate methods of recording work carried out for public relations clients accurately and discuss the methods which can be used to assess working relationships with public relations clients. Evidence should show an in-depth understanding and broad range. Learners should include current, relevant examples where appropriate.

## Resources

### Books

Green A – *Effective Communication Skills for Public Relations* (Kogan Page, 2006)  
ISBN 978-0749444075

Menken I – *The Business Relationship Management Handbook*, 3rd Edition  
(Emero Pty Limited, 2011) ISBN 978-1743042229

Morris T and Goldsworthy S – *PR Today: The Authoritative Guide to Public Relations*  
(Palgrave Macmillan, 2011) ISBN 978-0230240094

Theaker A – *The Public Relations Handbook* (Routledge, 2011)  
ISBN 978-0415598149

### Websites

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations  
(CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association  
(PRCA)



# Unit 19: Understanding the Importance of Brands in Public Relations

Unit code:	M/504/0934
QCF Level 4:	BTEC Professional
Credit value:	4
Guided learning hours:	32

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## Unit aim

This unit provides the learner with a broad understanding of the branding process in relation to public relations, including how brands are created, the key elements of brands, their changing audience and key branding techniques.

## Unit introduction

Understanding the history and processes behind brands is becoming more useful and relevant to the public relations professional. Many public relations agencies and in-house public relations teams involve themselves in the internal and external communications strategies of their clients and, as such, they are frequently briefed to manage the communication of the brand and brand values.

Learners will examine the theory behind brands, the historical perspective, the relationship to the marketing mix and the process of brand development. Learners will also explore the types of operational activity and involvement of public relations in brands.

The unit gives learners the opportunity to examine brand architecture, positioning and promise and the six key components of branding. The unit includes an in-depth analysis of the changing brand audience including the internal audience. The constituent ethics and responsibility of the branding activity are also considered.

Overall, the unit gives learners an understanding of best practice to enable them, as a member of the public relations team, to purposefully engage with fellow professionals in activities related to brands.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
1 Understand the concept of brands	1.1 Discuss the concept of brands reflecting historical changes 1.2 Analyse the relationship of brands to the marketing mix 1.3 Discuss the brand development process
2 Understand how to deconstruct brands	2.1 Describe brand structure and architecture, using given organisational examples 2.2 Analyse differences in brand hierarchy structures 2.3 Examine the elements of a brand through its key brand components
3 Understand the role of public relations in supporting brands	3.1 Describe the role of the public relations team in positioning a brand 3.2 Describe the role of the public relations team in maintaining ongoing brand communications
4 Understand the changing nature of the brand audience	4.1 Discuss the changing needs of a brand audience 4.2 Assess how brands are developed for audience types 4.3 Explain the importance of ethics and brand responsibility 4.4 Analyse the impact of internal branding through audience engagement

## Unit content

### 1 Understand the concept of brands

*Key theoretical concepts:* how brands represent the full 'personality' of a company; the tangible and intangible elements of brands; the requirement for flexibility and adaptability in a changing society

*History of brands:* emergence after the Industrial Revolution; links between family and businesses, e.g. Ford, Procter and Gamble (P&G), Philips; connections with social pioneers, e.g. Cadburys, Rowntree, Friends Provident; growth of post-war economies (boom in advertising, rising consumerism, offer to audience of product or service values)

*Analysis of brands in the marketing mix:* relationship of brand to the marketing mix (people, product, price, place, promotion); public relations involvement in brand development, e.g. formulating a brand strategy, communicating the brand and its values

*Process for brand development:* strategy; creativity and the role of design in brand development; implementation; communication (public relations); teamwork; talent

### 2 Understand how to deconstruct brands

*Brand structure:* visibility to customer; cohesion through values; range of products available from large organisations, e.g. Tata Brand Architecture and hierarchy structures: structure of brands within organisational entities; corporate brands and sub-brands; brand relationships; family or umbrella brands; individual brands; endorsed brands; brand extensions, e.g. Tesco; different fast-moving consumer goods (FMCG) brands available under company umbrella, e.g. P&G, Unilever

*Six key components of the brand promise:* brand identity (physical, emotional, comparative); image (reputation); character (integrity); culture (values); personality (warmth); essence (emotion)

### 3 Understand the role of public relations in supporting brands

*Operational brand activity roles:* client manager, e.g. attract new clients; strategists, e.g. ensure that brand is in line with company vision; digital specialists, e.g. create the brand online; creative team, e.g. creating the brand through words and images; production team, e.g. ensure brand is delivered through various formats including social media; public relations team, e.g. ensure ongoing communication is maintained through relevant media channels including social media

*Positioning the brand with public relations campaigns:* place in the market; developing the image to create an impact; developing strength and clarity of brand; distinguishing the brand, e.g. Benetton

*Supporting brand through public relations:* research and analysis; brand analysis; customer analysis; competitor analysis; translating research into action; applying brand to outputs

*Using public relations in a relaunch (internal public relations):* engaging the employee audience; communicating across the organisation; communicating for behaviour change; communicating the 'green' issue; internal effects of relaunch

#### 4 Understand the nature of the changing brand audience

*Audience analysis:* historical attitude to audience, e.g. during the 1960s brands communicated in a one-sided manner; the changing audience (diversified, segmented); audience segmentation; creating trust and loyalty through positive PR; audience 'self-actualisation' (Maslow)

*Audience type:* emergent markets; 'teen' brands; mothers; mass exclusive; digital media; ambient media

*Ethics and responsibility:* brand differentiator; the conscious customer; integrating social and environmental concerns

*Digital:* digital immigrants and digital natives; social media; brands online

*Employee audiences:* internal branding, e.g. TNT; internal communications strategy; internalising the brand; importance of engaging the internal audience

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 7: Communicating Effectively in Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

It is recommended that centres use a wide range of delivery methods to achieve the learning outcomes of this unit. These could include lectures, seminars, workshops, presentations, visits, project work, research using the internet and the use of personal and professional experience.

Delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as brand specialists.

Learning outcome 1 could be delivered using case studies from organisations, such as Google or McDonalds, who have transformed themselves over a number of years. A public relations professional with relevant client experience could be invited to talk to learners about the brand development process. Learners may draw on their experience of the branding activity undertaken in their own workplace.

Learning outcome 2 could be delivered using case studies from organisations such as Tata, P&G or Tesco. A public relations professional with experience of positioning the brand and delivering the brand promise could be invited to talk to learners about the role of the public relations team in respect of these two functions, and the importance of key brand components. Learners could analyse the brand promise and position for a selected brand in preparation for a group discussion.

For learning outcome 3, a public relations professional with relevant client experience could be invited to talk to learners about the role of the public relations team in brand positioning and maintaining brand communication. Learners should have access to relevant literature on branding and be encouraged to ask questions.

Learning outcome 4 could be delivered through real-life situations based on the experience of the learner as a consumer and through relevant case studies, for example Burberry. A public relations professional with experience of internal branding could be invited to talk to learners about the importance of engaging the internal audience in any branding activity.

## Assessment

Assessment needs to be based on carefully selected, real-life situations. Learners should be encouraged to draw on evidence from the current marketplace and from their own workplace activities where appropriate.

For learning outcome 1, it is important that learners show a clear understanding of the emergence of branding after the Industrial Revolution and as to what now constitutes branding. They should also show a clear understanding of the part that branding plays in the marketing mix, and the subsequent brand development process, and the role of the public relations team in maintaining ongoing communication. Evidence should include relevant examples to show an in-depth understanding.

For learning outcome 2, learners are required to discuss the processes involved in deconstructing brands and to describe the key brand components using relevant examples to show an in-depth understanding. Brand examples must be agreed with the tutor in advance or given by the tutor to the learner.

For learning outcome 3, learners must show a clear understanding of the role of the public relations team both in positioning a brand and maintaining ongoing brand communication.

For learning outcome 4, learners must provide an in-depth analysis of the advantages of audience engagement in the launch, or relaunch, of a brand. As evidence they could produce a proposal to relaunch their employer's brand to an internal audience. The proposal should be appropriate for the type of audience.

## Resources

### Books

Davis M – *The Fundamentals of Branding* (AVA Publishing, 2009) ISBN 978-2940373987

Olins W – *The Brand Handbook* (Thames & Hudson, 2008) ISBN 978-0500514085

### eBooks

Wacker W, Hall R, Till B, Heckler D, Light L, Kiddon J, Matthews R – *Branding Strategies for Success* (Kindle edition) (FT Press, 2012) ASIN: B007JW8NGA

**Websites**

<a href="http://www.brandrepublic.com">www.brandrepublic.com</a>	News and features on branding
<a href="http://www.identityworks.com">www.identityworks.com</a>	Provides comments reviews and insight on corporate identities
<a href="http://www.interbrand.com">www.interbrand.com</a>	Interbrand (brand agency example)
<a href="http://www.ministryoftype.co.uk">www.ministryoftype.co.uk</a>	Commentary on branding
<a href="http://www.palgrave-journals.com">www.palgrave-journals.com</a>	<i>The Journal of Brand Management</i>
<a href="http://www.superbrands.uk.com">www.superbrands.uk.com</a>	Insight into Britain's strongest brands
<a href="http://www.wolffolins.com">www.wolffolins.com</a>	Wolff Olins (brand agency example)



## **Unit 20: Understanding How Public Relations Professionals Contribute to Internal Communications**

Unit code: T/504/0935  
QCF Level 3: BTEC Professional  
Credit value: 2  
Guided learning hours: 10

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### **Unit aim**

This unit provides the learner with an understanding of the role public relations professionals play in managing internal communications for an organisation, whether their own as an in-house team or their client's organisation.

### **Unit introduction**

In a world of globalised businesses and a plethora of media options the skills of public relations professionals are often needed to manage internal communications as well as external relations.

In this unit, learners will explore the role and importance of internal communication before considering the arguments for engaging public relations professionals in its implementation, whether in-house or from a specialist agency. They will also learn about the challenges facing public relations professionals working in internal communications and the requirements they are expected to meet.

Having examined context, learners will then investigate how public relations campaigns are implemented and how they can be evaluated. The unit should draw from the learner's experience in the workplace, where appropriate.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the context within which public relations professionals contribute to internal communications</p>	<p>1.1 Assess the role of internal communications within an organisation</p> <p>1.2 Compare the contributions of in-house and specialist agency public relations professionals to internal communications in organisations</p> <p>1.3 Discuss challenges public relations professionals face when designing internal communications plans</p> <p>1.4 Explain the requirements of internal communications produced by public relations professionals</p>
<p>2 Understand how internal communications campaigns are implemented by public relations professionals</p>	<p>2.1 Analyse advantages and disadvantages of different media used in internal communication campaigns</p> <p>2.2 Explain how internal public relations campaigns achieve their objectives</p> <p>2.3 Evaluate public relations internal communications campaigns against set objectives</p>

## Unit content

### 1 Understand the context within which public relations professionals contribute to internal communications

*Internal communications:* role, e.g. enforce vision and mission of organisation; purpose; importance to organisations, e.g. good internal communications facilitates 2-way communication between organisation and employees, contributes to well-informed and motivated employees, shapes organisational culture; enhances industrial relations; contributes to organisational performance and bottom line profitability

*Professionals involved in internal communications:* in-house public relations staff; managers; human resources staff; specialist public relations agencies

*Reasons for engaging public relations professionals in internal communications:* communications expertise; coordination with external public relations; importance of 'buy-in' of staff; complexity of media options for communication; complexity of communication requirements of globalised companies

*Challenges of internal communications:* lack of third party endorsements; limitations of communication channels; creating sustained interest

*Requirements of internal communications:* avoid controversial topics; complement external public relations campaigns; collaborate with managers; coordinate with external public relations, e.g. messages, timing, internal communications accord with corporate branding; support organisation's brand; create 'water-cooler' effect across international boundaries

### 2 Understand how internal communications campaigns are implemented by public relations professionals

*Purposes of internal public relations campaigns:* e.g. reduce staff turnover, implement change, motivate staff, objectives of campaign, different audiences

*Campaign tactics:* similarities with and differences from tactics used in external public relations; determining optimum amount of communications; opportunity to use senior managers in campaigns; trends, e.g. more case study style news, social media coordinated with other media, speedier responsive communications

*Tools:* audience profiling; media profiling; selection of media; primary and supporting messages; timing considerations

*Media used in internal communications:* types, e.g. print media, internal TV and radio, intranet sites, social media, talks, speeches and events, posters and signs, company newspaper/magazine; trends in media, e.g. decline in intranets, increase in social media

*Methods:* hard news; soft news, e.g. purpose made surveys; news events

*Evaluation:* use of objectives; evaluation methods

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 3: Understanding the Use of the Written Word for Public Relations Unit 4: Understanding the Creative Process to Generate Ideas Unit 6: Understanding Public Relations Campaign Planning	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This unit could be delivered through traditional face-to-face teaching or through the use of learning materials. It would be beneficial for learners to have exposure to public relations professionals who have experience of working with internal communications. It may also be possible to draw on the experiences of learners if they are working in this area.

In learning outcome 1, learners cover the context in which public relations professionals manage internal communications. Learners could discuss the approach to internal communications within their own organisations and suggest the reasons for the decisions made. It may also be interesting for learners to interview professionals working in internal and external communications to highlight the associated challenges and requirements.

For learning outcome 2, learners could study case studies of internal communications public relations campaigns and analyse the tools, methods and media used and the reasons for the decisions made. Learners could also reflect on how the challenges highlighted in learning outcome 1 were handled in the campaigns. Learners could practise using evaluation methods by applying them to the case studies.

## Assessment

This is a knowledge-based unit and the assessment methods used should enable learners to fully achieve the discursive nature of the assessment criteria. Suitable methods would be a written assignment or presentation or a combination of both. If a presentation is used then the assessor should complete a detailed observation record and this should be supported by learner notes or visual aids. A learner's place of work could provide the basis for the assessment but, if this is not possible, case studies or an investigation of another organisation could be used.

For learning outcome 1, learners need to demonstrate a full understanding of the context in which public relations professionals are employed in internal communications and the reasons for this.

Learning outcome 2 is based on public relations campaigns for internal communications and learner responses should include a full explanation of the reasoning behind the decisions made when planning campaigns. For 2.3, learners should demonstrate their evaluation skills by setting success criteria, weighing evidence from different sources and coming to a reasoned conclusion.

## Resources

### Books

Bussey C – *Brilliant PR* (Prentice Hall, 2011) ISBN 978-027374658

Morris T and Goldworthy S – *PR Today* (Palgrave Macmillan, 2012)  
ISBN 978-0230240094

### Websites

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations (CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association (PRCA)



# Unit 21: Plan and Organise an Event

Unit code:	R/601/2540
QCF Level 3:	BTEC Professional
Credit value:	4
Guided learning hours:	28

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## Unit aim

This unit is about planning and organising an event.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

Planning and organising events is a key part of many public relations campaigns. Whether it's a small client meeting or a product launch attended by hundreds of guests, key event planning principles apply.

Event organisers need to understand the importance of planning and be able to coordinate activities and resources in order to deliver a professional event.

In this unit, learners will develop the practical skills required for event planning. They will examine the role of an event organiser and how to define what is required to plan and organise an event.

The unit also covers areas such as venue choice, resources and delegate management to enable learners to demonstrate their competence in planning and organising an event.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand the role of an event organiser in planning an event</p>	<p>1.1 Explain the purpose and benefits of planning an event</p> <p>1.2 Explain the role of the event organiser in:</p> <ul style="list-style-type: none"> <li>a) meeting the objectives of the event</li> <li>b) agreeing a brief and budget for the event</li> </ul> <p>1.3 Identify and evaluate the types of risks associated with events and explain how to minimise these</p> <p>1.4 Explain the purpose and benefits of a contingency plan for an event</p> <p>1.5 Describe the types of problems that may occur when organising an event and how to solve them</p> <p>1.6 Categorise different types of events and their main features</p>
<p>2 Understand the arrangements to be made when planning and organising an event</p>	<p>2.1 Explain the role of the event organiser for:</p> <ul style="list-style-type: none"> <li>a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements</li> <li>b) meeting relevant health, safety and security arrangements</li> <li>c) meeting legal and organisational requirements for contracts</li> <li>d) organising resources and the production of event materials</li> </ul>

Learning outcomes	Assessment criteria
	<p>e) the types of activities and resources that may be needed during an event</p> <p>f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood</p>
<p>3 Understand the different types of venues and resources needed for different types of events</p>	<p>3.1 Identify and evaluate different types of venue in terms of suitability for events and costs</p> <p>3.2 Describe a range of resources that may be needed for events and illustrate how they may be used</p> <p>3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event</p>
<p>4 Be able to plan and organise an event</p>	<p>4.1 Agree an event brief and budget</p> <p>4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies</p> <p>4.3 Identify and agree resources and support needed for organising an event</p> <p>4.4 Agree requirements for venue(s)</p> <p>4.5 Identify venue and agree costings</p> <p>4.6 Liaise with the venue to confirm event requirements and/or any special delegate requirements</p> <p>4.7 Agree requirements for resources</p> <p>4.8 Co-ordinate resources and production of event materials</p> <p>4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements</p>

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

## Unit content

### 1 Understand the role of an event organiser in planning an event

*Event:* planning (purpose, benefits); types of events (internal/external, formal/informal, size, audience, purpose, number of delegates, location); purpose and type, e.g. product launches, exhibitions/trade shows, seminars, conferences, hospitality events, experiential/public relations stunts, press conferences); event-related public relations activities

*Event organiser:* role; responsibilities; meeting objectives; agreeing the brief; agreeing the budget; event-related public relations activities, e.g. media relations, photography/video, promotional, design

*Event risks:* types of risk, e.g. weather, bad planning, unclear brief, health and safety, supplier issues; minimising risks (service level agreements with suppliers, clear brief, expectation management, contingency plan); risk analysis

*Event problems:* types of problem, e.g. venue, catering, delegate, IT, supplier, speakers, entertainment, security, access

### 2 Understand the arrangements to be made when planning and organising an event

*Delegate needs:* access requirements (security, disability); dietary requirements (diet, allergy); disability requirements, e.g. Braille, sign language; planning

*Venue:* event contact (pre and during); event itinerary

*Requirements:* health and safety, e.g. access, fire exit procedures, toilet facilities, security; legal, e.g. public liability insurance; contract (service level agreement, financial liabilities, responsibilities, payment terms); audiovisual (AV) or stage crew requirements, e.g. access to venue to set up, catering (for event and suppliers)

*Resources:* joining instructions; registration and event materials, e.g. badges, delegate list, delegate pack, agenda, speaker's notes, goodie bag; contingency spares, e.g. blue tack, scissors, glue, pens, mini sewing kit, wipes; event-related, e.g. exhibition stands, press releases/press packs, press office materials, product samples, literature

### 3 Understand the different types of venues and resources needed for different types of events

*Types of venue:* location (indoor, outdoor, urban, country), accessibility (rail, road, air transport links); function (formal/informal, size, facilities, availability, accommodation); cost (delegate rate, additional costs, discounts); AV/staging requirements

*Resources:* event packs, e.g. delegate, press; stationery; contingency spares

*Selection criteria:* size; availability; cost; facilities; suitability for event; access; purpose and benefits, e.g. fit for purpose, client agreed, ease of decision making, focused, link to brief and budget

#### 4 **Be able to plan and organise an event**

*Planning:* event brief; budget; manager/client sign off; aims and objectives; risk analysis; contingency plan; resources; support from venue; promotion/publicising of event; media relations

*Venue:* familiarisation visit selection criteria; requirements (event, delegate); costings; service level agreements and contract

*Resources:* requirements; event materials; liaison with venue to coordinate

*Requirements:* health and safety; security; legal; contract; AV/staging

*Event team:* training; team brief; delegation and responsibilities; event itinerary (timings); run-through; IT check

*Delegate management:* delegate list (list compilation according to brief, contingency list); invitations (design, type including email and online registration forms, delivery, time); managing responses (spreadsheet, details, link to venue requirements, unsubscribe requests, client relationship management systems); joining instructions (itinerary, venue details, map, access information, contact details, event materials, accommodation details, dietary requirements)

*Speaker liaison:* e.g. agreeing a brief, speaker notes, arranging transport/accommodation/catering for speaker(s), agreeing and arranging AV/staging requirements, arranging photo and/or video opportunity

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 22: Co-ordinate an Event	Unit 2: Understanding Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace. *Unit 22: Co-ordinate an Event* could be linked to this unit and it would be beneficial for delivery of the two units to be planned so that they complement each other. There may be crossover in some of the learning outcomes.

The unit should be related to types of event and the role of public relations in events that relate to the learner's role. For example, organising and attending a large event may be part of the learner's wider public relations role and cover a range of activities, from booking space and coordinating the design of an exhibition stand, through to putting together promotional materials, press releases, media interviews and liaising with the exhibition press office. Other scenarios where public relations interface with event planning and organisation may include product launches, seminars, conferences, hospitality events, experiential/PR stunts and press conferences.

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include workshops, presentations, site visits, talks from industry professionals, project work, practical exercises, research using the internet, and the use of personal and/or professional experience.

Centres are encouraged to organise talks from industry professionals and arrange venue visits, where possible, and it is recommended that delivery revolves around real-life situations and case studies.

Learning outcome 1 could be delivered through the use of a real-life case study. Learners could be given an event scenario where they are the event organiser. They could work in groups for part of the learning outcome to brainstorm, discuss key points and share experiences. Delivery could also include problem-solving exercises for the group to brainstorm.

For learning outcome 2, it is suggested that an event-organising professional could be invited to talk to learners about their role and to answer learner questions. In preparation for the talk, learners could prepare a range of pertinent questions, relating to the scenario they started working on in learning outcome 1. This should include the role of public relations in planning and organising an event.

For learning outcome 3, tutors could consider external visits to different types of venue where learners could undertake some research. This learning outcome lends itself well to a practical approach where learners can experience different types of venue for themselves.

For learning outcome 4, learners could either plan and organise an event in the workplace (on their own or as part of an event team), or be given a comprehensive scenario to work with whilst they are developing the technical skills behind this unit. This learning outcome is practical and it is recommended that it is delivered using real-life scenarios to enable learners to develop the range of skills required and the confidence to demonstrate their competence for assessment.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. This is a Council for Administration (CfA) unit and therefore the Assessment Strategy for Business and Administration document must be followed; please see *Annexe G*.

If this unit is delivered alongside *Unit 22: Co-ordinate an Event*, there may be opportunity for cross-mapping in assessment.

Evidence for learning outcomes 1 to 3 may be generated through learner reports/reflective accounts, professional discussion and questioning. For learning outcome 1, learners could demonstrate their understanding of the role of an event organiser through a presentation (individual or team) and responses to real-life scenarios or workplace examples. For learning outcome 2, assessment could revolve around a portfolio based on the learner's role in the workplace or on an event organiser they work closely with. The portfolio should include how they have dealt with real-life scenarios and reflections on their own experiences. Evidence could include resources, plans, checklists, correspondence, witness statements and self-reflections.

For Learning Outcome 3, tutors could base assessment on site visits conducted as part of delivery of the unit. Learners could be given an event planning scenario based on a suitable venue. Using research and their workplace experience, learners could put together a report or presentation on their selected venue, justifying their choice. If learners are working on events in the workplace, this assessment could be linked to those events.

For learning outcome 4, learners should plan and organise an actual event in the workplace (on their own or as part of an event team). With such a practical learning outcome, assessment should revolve around evidence appropriate to the learner's job role such as copies of documents and resources, checklists, planning documents, timelines, professional discussion, photographic evidence, witness statements and learner reports/reflective accounts.

## Resources

### Books

Allen J – *Event Planning: The Ultimate Guide to Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, Incentives and Other Special Events* (Wiley, 2009) ISBN 978-0470155745

Kilkenny S – *The Complete Guide to Successful Event Planning* (Atlantic Publishing Company, 2011) ISBN 978-1601386991

## Unit 22: Co-ordinate an Event

Unit code:	Y/601/2541
QCF Level 3:	BTEC Professional
Credit value:	4
Guided learning hours:	30

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### Unit aim

This unit is about co-ordinating the delivery of an event.

### Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

### Unit introduction

Events can range from small meetings and informal parties to large conferences and exhibitions. The one thing they have in common is planning and organisation – the keywords for any event coordinator. Public relations professionals are required to coordinate a wide variety of events from major trade and consumer exhibitions through to seminars, conferences, road shows, hospitality events, product launches and press conferences.

Coordinating an event requires planning and delivering to an agreed brief and objectives. Whatever the brief from the client, an event organiser needs to have an understanding of how to coordinate the different elements required for the successful management of an event and the role of the event in the overall public relations strategy. In this unit, learners will gain an understanding of the role of an event coordinator and of the activities and resources required when coordinating an event.

The unit also covers topics such as health and safety, venue management, problem solving, event budgeting and delegate management to enable learners to demonstrate their competence in coordinating an event.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief	1.1 Explain the responsibilities of an event co-ordinator 1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief
2 Understand the activities required when co-ordinating an event	2.1 Explain the role of the event co-ordinator during the event for: <ul style="list-style-type: none"> <li>a) all delegate provision and needs</li> <li>b) meeting relevant health, safety and security requirements</li> <li>c) observing legal and organisational requirements for contracts</li> <li>d) co-ordinating resources and the use of event materials</li> <li>e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out</li> <li>f) resolving problems</li> <li>g) overseeing the work of key staff</li> </ul> 2.2 Explain the role of an event co-ordinator after an event for: <ul style="list-style-type: none"> <li>a) clearing and vacating the venue</li> <li>b) organising follow up papers and activities, if required</li> <li>c) reconciling accounts to budget</li> <li>d) evaluating an event and the methods that can be used to do this</li> </ul>

Learning outcomes	Assessment criteria
3 Be able to co-ordinate an event	3.1 Prepare the venue and make sure all necessary resources are in place 3.2 Co-ordinate activities during an event, in line with agreed plans 3.3 Help delegates to feel welcome 3.4 Respond to delegates' needs throughout an event 3.5 Resolve problems, as required 3.6 Oversee the work of key staff during the event 3.7 Monitor compliance with relevant health, safety and security requirements 3.8 Liaise with the management of the venue to make sure facility resources are in place 3.9 Arrange clearing, and vacating the venue according to the terms of the contract 3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required 3.11 Reconcile accounts to budget, if required 3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant 3.13 Agree key learning points and use these to improve the running of future events

## Unit content

### 1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief

*Responsibilities:* understand and agree event brief in relation to overall public relations strategy; set event objectives; planning; coordinate event (client, suppliers, internal functions, delegates); manage budget; deliver event; evaluate event

*Planning:* event brief; budget; client/manager sign off; aims and objectives

### 2 Understand the activities required when co-ordinating an event

*Delegate needs:* access requirements, e.g. security, disability; dietary requirements, e.g. diet, allergy; disability requirements, e.g. Braille, sign language, hearing loops, flash photography; planning to meet requirements

*Requirements:* health and safety, e.g. access, fire exit procedures; legal, e.g. public liability insurance; security; contractual (service level agreement, financial liabilities, responsibilities, payment terms); organisational procedures for event contracts

*Resources:* joining instructions; registration and event materials, e.g. badges, delegate list, delegate pack, agenda, speaker's notes, goodie bag

*Venue:* event contact (pre and during); event itinerary; problem solving, e.g. catering, delegate, IT, supplier, security, access

*Post-event:* follow-up activities and procedures, e.g. vacating venue, event papers, liaising with delegates and client, post-event public relations activities, e.g. press release, captioning and distribution of photography, media relations; budget reconciliation; event evaluation, e.g. feedback from delegates, venue and client, questionnaires, post-event debrief, key performance indicators

### 3 Be able to co-ordinate an event

*Venue:* planning (in line with event brief); preparation (event itinerary); resources and equipment, e.g. seating, IT, audiovisual, staging, display stands, photography, speakers

*Delegate management:* welcome (attitude, professionalism); problem solving

*Event facilitation:* delegation; supervision of other staff (own team members, venue staff, suppliers); venue liaison; compliance monitoring (health and safety, security)

*Post-event:* follow-up activities and procedures, e.g. clearing, vacating venue, contractual obligations, event papers (drafting and circulation), media relations, liaising with delegates and client; budget reconciliation; event evaluation (feedback, post-event debrief, key performance indicators); monitoring of media coverage; recommendations and key learning points

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 21: Plan and Organise an Event	Unit 2: Understanding Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace. *Unit 21: Plan and Organise an Event* is linked to this unit and it may be beneficial for delivery of the two units to be planned so that they complement each other.

This unit should relate to the coordination of events within the public relations role. For example, coordinating an event may be part of the learner's wider public relations role and will cover a range of activities as outlined in this unit. Within the context of this unit, it should be noted that event-related public relations activities will feature, ranging from venue liaison to drafting press releases and dealing with post-event media relations. The type of events that may suit this unit include exhibitions, product launches, seminars, conferences, corporate away days, hospitality events and press conferences.

It is recommended that centres use a wide range of delivery methods to achieve all the learning outcomes in the unit. These could include workshops, presentations, site visits, talks from industry professionals, project work, practical exercises, research using the internet, and the use of personal and/or industrial experience.

Centres are encouraged to organise talks from public relations events specialists, where possible, and it is recommended that delivery revolves around real-life situations and case studies. Learners should be encouraged to shadow colleagues at live public relations events, to work with the team in order to understand the chain of required tasks for the coordination of events.

For learning outcome 1, an event coordinator could be invited to talk to learners about their role and to answer learner questions. In preparation for the talk, learners could prepare a range of pertinent questions. Delivery could also look at different event coordinating roles – at venue, in-house or agency.

As this is a practical competency unit, learning outcome 2 could revolve around the preparation for a real-life event. Learners could work in groups to discuss different elements of the event coordinator role and put together checklists for the coordination of an event. For problem solving and dealing with delegate needs, learners could be encouraged to take part in role play to develop these skills. This learning outcome is likely to encompass other elements of public relations -related

event activities including dealing with photography, design, promotion, staging, journalists, press offices and interview opportunities. It will be key for learners to understand the role of the event within the wider public relations strategy.

For learning outcome 3, learners could either coordinate an event in the workplace (on their own or as part of an event team), or be given a comprehensive scenario to work with. This learning outcome is practical and it is recommended that it is delivered using a real-life scenario. It is important that learners understand the importance of the post-event 'wash and brush up' stage ensuring that event evaluation is documented and feedback taken on board for future events.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. This is a Council for Administration (CfA) unit and therefore the Assessment Strategy for Business and Administration document must be followed; please see *Annexe G*.

If this unit is delivered alongside *Unit 21: Plan and Organise an Event*, there may be opportunity for cross-mapping in assessment.

Evidence for learning outcomes 1, 2 and 3 may be generated through learner reports/reflective accounts, professional discussion and questioning, and observation of learner workplace activities.

For learning outcome 1, learners could demonstrate their understanding of the role of an event organiser through research and a presentation (individual or team).

For learning outcome 2, learners could produce a portfolio or diary of the role of the event coordinator in preparing for an event. The portfolio could contain the learner's plan for the event, how they will tackle certain issues and how they will deliver the event in agreement with the brief and set objectives. The portfolio could also include self-reflection and key learning points for the actual event.

For learning outcome 3, learners should coordinate an actual event in the workplace (on their own or as part of an event team). With such a practical learning outcome, assessment should revolve around evidence such as an agreed event brief, notes from meetings, copies of documents and resources, checklists, planning documents, timelines, budgets, records of conversations, photographic evidence, witness statements, evaluation, delegate feedback questionnaires and self-reflection.

## Resources

### Textbooks

Allen J – *The Business of Event Planning: Behind-the-Scenes Secrets of Successful Special Events* (Wiley, 2002) ISBN 978-0470831885

Craven R E, Johnson Golabowski L and Waldoch D – *The Complete Idiot's Guide to Meeting and Event Planning* (Alpha Books, 2006) ISBN 978-1592574629

# Unit 23: Plan and Organise Meetings

Unit code:	D/601/2542
QCF Level 3:	BTEC Professional
Credit value:	5
Guided learning hours:	25

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## Unit aim

This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

Meetings occur in every area of public relations, from a small meeting with a client to large ones within an agency involving many colleagues, or stakeholders on a large project. A well-run meeting is a chance to achieve objectives, set goals, share ideas, keep everyone informed on progress and solve any issues arising efficiently.

Planning a meeting requires organisational and problem-solving skills and professionalism, and offers the opportunity to demonstrate these qualities to colleagues and clients.

There is a lot to remember when planning and organising meetings. This unit covers the important decisions, such as meeting style and structure, that need to be made to ensure a meeting achieves its objectives. The unit also details the key tasks that need to be undertaken to ensure the meeting runs smoothly, from organising the relevant documents and equipment, to engaging guests professionally and, finally, recording and following up the meeting to maximise its impact.

By the end of this unit, learners should be able to plan a meeting relevant to its objectives and conduct it professionally from inception to completion.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
1 Understand the arrangements and actions required for planning and organising meetings	1.1 Explain the role of the person planning and organising a meeting 1.2 Describe the different types of meetings and their main features 1.3 Explain how to plan meetings that meet agreed aims and objectives 1.4 Explain the purpose of agreeing a brief for the meeting 1.5 Explain how to identify suitable venues for different types of meetings 1.6 Describe the types of resources needed for different types of meetings 1.7 Outline the main points that should be covered by an agenda and meeting papers 1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings 1.9 Describe the health, safety and security requirements that need to be considered when organising meetings 1.10 Explain the purpose and benefits of briefing the chair before a meeting 1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required

Learning outcomes	Assessment criteria
	<p>1.12 Describe the types of information, advice and support that may be need to be provided during a meeting</p> <p>1.13 Describe the types of problems that may occur during a meeting and how to solve them</p> <p>1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved</p> <p>1.15 Explain how to record actions and follow up, if required</p> <p>1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting</p> <p>1.17 Describe how to agree learning points to improve the organisation of future meetings</p>
2 Be able to prepare for a meeting	<p>2.1 Agree and prepare the meeting brief, checking with others, if required</p> <p>2.2 Agree a budget for the meeting, if required</p> <p>2.3 Prepare and agree an agenda and meeting papers</p> <p>2.4 Organise and confirm venue, equipment and catering requirements, when necessary</p> <p>2.5 Invite attendees, confirm attendance and identify any special requirements</p> <p>2.6 Arrange catering, if required</p> <p>2.7 Arrange the equipment and layout of the room, if required</p> <p>2.8 Make sure the chair receives appropriate briefing</p>

Learning outcomes	Assessment criteria
<p>3 Be able to support running a meeting</p>	<p>3.1 Welcome attendees and offer suitable refreshments (if required)</p> <p>3.2 Make sure attendees have full set of papers</p> <p>3.3 Make sure a person has been nominated to take minutes, if required</p> <p>3.4 Provide information, advice and support when required</p>
<p>4 How to follow up a meeting</p>	<p>4.1 Produce a record of the meeting</p> <p>4.2 Seek approval for the meeting record, amend as required</p> <p>4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record</p> <p>4.4 Follow up action points, if required</p> <p>4.5 Evaluate meeting arrangements, and external services where used</p> <p>4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used</p> <p>4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support</p>

## Unit content

### 1 Understand the arrangements and actions required for planning and organising meetings

*Planning arrangements and actions:* attendee list (participants, chair, speakers, minute taker); send meeting invitation; circulate meeting agenda and other relevant documentation, e.g. minutes of previous meetings; necessary components of a meeting, e.g. venue, transport, schedule, refreshments, information, equipment, resources, meeting papers; agreeing aims of a meeting; preparing brief and other preliminary work to reflect aims; making contingency plans for necessary components; keeping to meeting budget

*Types of meeting:* differing requirements for different types of meeting, e.g. size, internal/client based/multi-organisation/public nature, aims and objectives, time available, setting timeframe, level of expected action resulting from meeting

*Roles within a meeting:* role of meeting planner and organiser, e.g. continuous responsibility for smooth running, level of participation in meeting content, level of intervention expected; enhanced role of meeting chair or speakers; level of interaction by participants; procedural roles, e.g. minute taker, legal expert, human resources expert; dealing with stakeholder representatives

*Organising arrangements and actions:* checking on arrangements immediately prior to the meeting; greeting participants and offering refreshments if appropriate; ensuring procedural roles are fulfilled throughout; ensuring fair communication between participants if required; solving or working around any problems that arise, e.g. absent participants, logistical errors, technological issues, shyness, impasse or hostility; ensuring there are thorough records of the meeting; following up with participants

*Safety and support:* complying with relevant health and safety laws; ensuring that everyone feels comfortable during the meeting; consider security of venue and participants; maintain privacy and confidentiality of information shared, e.g. Data Protection Act, Chatham House Rules, personal reputation; provide advice and resources to support participants if required

### 2 Be able to prepare for a meeting

*Prepare logistics for a meeting:* book all necessary components; anticipate any problems on the day, e.g. transport issues, nearby events, company or industry-wide emergencies; keep in touch with service providers and participants; change timeline and budget estimates in accordance with events; keep a record of planning activities and contingencies

*Prepare documents for a meeting:* notice of meeting; meeting agenda; previous minutes if applicable; keeping meeting brief to hand; safety of documents, e.g. saving in multiple places, digital and hard copies, handling sensitive data; checking number of documents; proofreading; distributing to participants before the meeting if required

### 3 Be able to support running a meeting

*Support for attendees:* treat participants as individuals, e.g. comply with disability laws, dietary requirements, personal communication style; ensure that the meeting is moving forward where possible; deal courteously with rudeness, aggression or slander if appropriate

*Meeting requirements:* circulation of meeting papers; ensure throughout that tasks are being carried out at the appropriate times, e.g. refreshments, expert input, meeting breaks; ensure meeting minutes and decision/action points are recorded accurately; check that technology is working properly; have details for support in solving likely issues; bring the meeting to a close politely when appropriate

### 4 How to follow up a meeting

*Meeting records:* ensuring there is a clear formal record of participants, meeting time and subject, discussion and action points; checking minutes and agreed actions, adding any appropriate content; ensuring meeting records, including relevant decisions, are circulated promptly to involved parties; maintaining confidentiality where appropriate; keeping these records safe for future reference

*Evaluation of a meeting:* evaluation of logistical components, e.g. issues with venue, refreshments, budget; evaluation of participants, e.g. contribution, satisfaction with meeting, variety, networking potential; evaluation of own performance, e.g. planning, response to issues arising, conduct during meeting; changing plans for future meetings according to evaluation; invite feedback from participants and service providers and respond accordingly

*Taking action after a meeting:* using meeting data to influence future work; informing colleagues of the meeting's content where useful; identifying any need for follow-up meetings or individual contact

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following unit in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

As meetings are a collaborative event, delivery methods should be used which encourage these skills. Presentations, small-group work and discussions will be particularly useful in making learners comfortable with the atmosphere of a meeting. As a group, learners could be encouraged to prepare meeting checklists to support the planning of meetings.

Organisational skills are also a major part of planning meetings. Small-group work with a high level of learner independence will help develop these.

As some aspects of organising a meeting are practical in nature, such as estimating timelines and dealing with mishaps on the day, learners should be encouraged to draw on their own experiences from the workplace. Learners should have the opportunity to attend meetings to shadow colleagues taking the formal note of the meetings. Learners may find it beneficial to take their own notes and compare these to the formal record. Tutors may need to assist learners in improving this skill.

Delivery should centre around real-life examples from the public relations industry. Learners could look at different elements of a client meeting and an internal agency meeting, as well as consider in-house team and cross-company meetings. Public relations professionals could present on meetings they have held, giving an insight on indicative meeting content for different public relations meeting types, and learners could prepare questions about preparation, follow-up and any problems or unusual features. Additionally, the group could discuss local venues or businesses that might provide services to a meeting and their own experiences from the workplace.

Whilst realistic preparation is important, some aspects of planning and organising meetings will not be available in reality, either locally or to those at a junior level. Planning hypothetical events, using real-life examples, can be a useful delivery tool. Learners could take three specific public relations meetings formats, for example a team brainstorming meeting, a client meeting and a third party meeting, and plan and execute them all end-to-end through role play.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. This is a Council for Administration (CfA) unit and therefore the Assessment Strategy for Business and Administration document must be followed; please see *Annexe G*.

Evidence may be generated through learner reports and reflective accounts, professional discussion and questioning, observation of workplace activities and product evidence applicable to the learner's job role, for example emails, minutes taken, meeting records, agendas, budgets, meeting papers and evaluations.

For 1.1 to 1.10 assessment could be combined as a procedure document suitable for someone new to planning and organising public relations meetings, providing a full guide to preparing for their first meeting. This may be supported by learners' real-life examples. Assessment criteria 1.11 to 1.13 could be covered through professional discussion about a relevant meeting, explaining the organiser's role and how it will help the meeting proceed, including how any likely issues could be resolved. Assessment criteria 1.14 to 1.17 could be combined as a written task based on a real-life meeting requiring follow-up action, including the record of the meeting, feedback gained from participants and action taken in response, and a self-evaluation.

For 2.1 to 2.3 and 2.8 assessment could be combined by learners preparing the necessary documents for a real-life meeting, including a usable brief, budget, agenda and meeting papers and a brief and additional relevant resources for the meeting chair. Assessment criteria 2.4 to 2.7 could be combined as a portfolio of evidence, with notes, pertaining to a meeting the learner has organised, or the portfolio could comprise research on venues and logistics with notes for a future meeting. This should show consideration of the type of meeting and attendee requirements and include all necessary components for a functional meeting. Learners might include feedback from suppliers as well as their employer to demonstrate their professional conduct.

For 3.1 to 3.4 assessment could be combined with an employer statement evaluating a real meeting, the tutor's presence at a meeting or similar video evidence. Learners should demonstrate adequate preparation by having relevant materials, including spare copies, and should maintain a polite and professional manner.

For 4.1 to 4.4 assessment could be combined as a written task, with learners producing records from a real-life example and then either using real feedback, exchanging them with another learner or using generic feedback to show edits to the records. The meeting record should be clear, accurate and complete, and should show sensible edits in response to legitimate suggestions. Assessment criteria 4.5 to 4.7 could be combined as a classroom or small-group presentation evaluating a meeting held or attended, as learners will benefit from sharing evaluations. Learners should evaluate several aspects of a meeting, taking account of the meeting's type and purpose, and consider possible improvements based on feedback and their own evaluation.

## Resources

### Books

- Boehme A – *Planning Successful Meetings and Events* (AMACOM, 1998) ISBN 978-0814479957
- Carnegie D – *How to Win Friends and Influence People* (Vermillion, New Edition, 2006) ISBN 978-0091906818
- Diermeier D – *Reputation Rules: Strategies for Building Your Company's Most Valuable Asset* (McGraw-Hill, 2011) ISBN 978-0071763745
- Friedmann S – *Meeting and Event Planning for Dummies* (John Wiley & Sons, 2003) ISBN 978-0764538599
- Miller F and Pincus M – *Running a Meeting that Works* (Barron's Educational Series, 1997) ISBN 978-0812098235

### Websites

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|---|---|
| <a href="http://www.cipr.com">www.cipr.com</a>  | Chartered Institute of Public Relations (CIPR)                        |
| <a href="http://managementhelp.org/misc/meeting-management.htm">http://managementhelp.org/misc/meeting-management.htm</a>   | Free Management Library - guidelines to conducting effective meetings |
| <a href="http://www.mmipublicrelations.com/blog/entry/6-questions-to-ask-potential-pr-clients-at-new-business-meetings/">http://www.mmipublicrelations.com/blog/entry/6-questions-to-ask-potential-pr-clients-at-new-business-meetings/</a> | MMI Public Relations Blog   |
| <a href="http://www.prca.org.uk">www.prca.org.uk</a>  | Public Relations Consultants Association (PRCA)                       |
| <a href="http://www.resourcecentre.org.uk/information/committee_members/info_pdf/Chair.pdf">http://www.resourcecentre.org.uk/information/committee_members/info_pdf/Chair.pdf</a>   | Resource Centre   |
| <a href="http://www.ucu.org.uk/media/pdf/0/5/org_meeting_1.pdf">http://www.ucu.org.uk/media/pdf/0/5/org_meeting_1.pdf</a>   | University and College Union – guidance on organising meetings        |



## Unit 24: Project Management Skills

Unit code:	H/502/5783
QCF Level 3:	BTEC Professional
Credit value:	1
Guided learning hours:	10

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### Unit aim

The aim of this unit is to give learners the knowledge, understanding and skills required to plan a project for successful completion on time and within a budget.

### Unit introduction

Project management is a vital part of many public relations activities, such as implementing a campaign or organising an event. In this unit learners will develop the required knowledge and skills to manage complex activities and tasks using the concepts of project management.

Project management skills are transferable and can be applied to a range of situations both in work and personal life. They will be useful in agency-side, client-side and managerial positions. Planning and leading a project is a significant achievement, whatever the project's size and complexity, and having the skills to do so will often provide the opportunity to move from an entry-level position in public relations to one with more responsibility.

Learners will explore the need for projects to be managed and will learn about the concept of project management. The skills required to manage projects efficiently are investigated, and learners will analyse their own project management skills. Learners will also be shown how to tailor these skills across a range of public relations situations.

On completion of the unit, learners will be able to apply skills and knowledge to plan a project to an agreed specification.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know the purpose and process of project management	1.1 Describe the purpose of project management 1.2 Outline the process of project management
2 Understand skills and knowledge required for project management	2.1 Explain the skills and knowledge needed for project management 2.2 Analyse own skills for project management
3 Be able to plan a project to a given specification	3.1 Outline details of a selected project to a given specification 3.2 Develop a plan to manage a project to a specific specification

## Unit content

### 1 Know the purpose and process of project management

*Project management:* definition of a project; definition of management, e.g. projects, people, financial; reasons for project management, e.g. way of managing complex tasks and activities, needed where different outcomes are possible; different types of project, e.g. small/large, short- or long term, internal or external

*Purpose in public relations:* includes needs of all stakeholders, e.g. client, agency, sub-contractors, client's customers; provides reliable time and budget estimates; includes risk management; applies to projects of different sizes and complexity; can be applied to wide range of projects, e.g. whole campaign, aspects of campaign, design, conferences and public events, office logistics

*Process of project management:* consult stakeholders; establish goals, agree precise specification; plan project, e.g. stages, activities, critical path analysis, project timescales, financial planning; select and motivate project team; account for slippage and contingencies; check and measure progress; keep team and stakeholders informed; complete project; review and report outcomes

### 2 Understand skills and knowledge required for project management

*Skills for managing a project:* personal qualities, e.g. leadership, organisation, accuracy, accountability, good communication; recognising expertise and delegating; dealing with several people or issues concurrently; acknowledging problems occur and staying calm

*Knowledge for managing a project:* project agreed by all stakeholders (content, purpose, timescales, budget, flexibility); knowledge of working environment, e.g. potential stalling points, logistical problems

*Self-analysis:* matching own skills with skills required for project management; recognition of gaps in own skills; matching personal strengths and weaknesses with those relevant to common public relations projects; reassessing regularly

### 3 Be able to plan a project to a given specification

*Specification:* adapting skills to specialist requirements; respecting the brief; adapting to real-world discrepancies without compromising specification

*Project planning:* consultation with stakeholders; project specification (terms of reference); project schedule; prioritisation of tasks; risk management strategy; techniques, e.g. flow charts, Gantt charts, PRINCE2 software; process management, e.g. monitor progress and quality of work, periodic review, milestone evaluation, spreadsheet to monitor budget/cash flow; keep team informed; project handover; how project will be evaluated

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 11: Plan and Manage your Own Workload	Unit 2: Understanding Public Relations Unit 6: Understanding Public Relations Campaign Planning Unit 9: Delivering and Evaluating Public Relations Campaigns	n/a

### Essential requirements

There are special resources needed for this unit.

### Delivery

As many practical activities as possible should be included in delivery to help learners relate the theoretical concepts and models in the unit content to practical work situations. A wide range of techniques, including presentations, seminars and guest speakers, can support learning. Learners should also be encouraged to participate in group work, conferences or presentations wherever possible, as these communications skills will be particularly relevant to public relations. Public relations journals and case studies can provide valuable additional resources to illustrate specific examples.

For learning outcome 1, learners could consider projects they have been involved in, particularly any involving a campaigning activity or event planning, but also classroom projects, tasks at work or personal hobbies. Further discussion will help learners to appreciate that projects can come in different shapes and sizes, from the small and straightforward to extremely large and highly complex.

Learners could begin by participating in a group discussion on why projects need to be managed, and what consequences could result from the good or bad management of a given public relations project, such as an event or campaign. Learners could then research one aspect of project management and give a presentation to the class on how this might be best achieved in relation to the specified project.

For learning outcome 2, guest speakers with project management experience in public relations and other fields could be invited to speak about different projects that they have managed. Learners could prepare questions to ask the speakers about the range of skills project managers require and why these skills are crucial to successful project outcomes. The class could then identify a list of commonly mentioned skills, and learners could use this as the basis for considering their own skill set.

Learners will need to work independently to plan a project from a specification for learning outcome 3, applying the process of project management. The terms of reference for the project may be suggested by learners, supported by the tutor and/or employer. Alternatively, tutors may provide different project specifications for learners to select from, for example a simple campaign or event. Learners should be aware of different tools for project management, such as flow and Gantt charts and basic software, and could discuss which of these might be most suitable for their planned project and why.

## Assessment

Assessment criteria 1.1, 1.2 and 2.1 may be combined into one assessment task as a leaflet providing information for an employee who is new to project management.

For 1.1, learners need to describe at least two different reasons for project management. Examples should be given to support their response.

For 1.2, learners need to give a clear outline of the key procedures required in project management and the order in which they need to be undertaken. This may be presented as a flow chart with notes but other forms of evidence may be used.

For 2.1, learners need to explain why at least two skills are required for successful project management, and identify the knowledge they would need to begin a project.

For 2.2, learners need to consider the effectiveness of their own project management skills. Learners must include a personal analysis of the required skills, supported with examples of situations where they have demonstrated these skills. Learners may also consider public relations projects suitable for their skill set.

For 3.1, learners need to outline a selected project to a given specification.

For 3.2, learners need to demonstrate how the selected project in 3.1 will be managed, showing briefly what will happen at each stage of the project management process. This may be presented to the class to share learning, as either a chart or PowerPoint presentation recorded by the tutor.

## Resources

### Books

Graham N – *Project Management for Dummies, UK Edition* (John Wiley & Sons, 2010) ISBN 978-0470711194

Kerzner H – *Project Management: A Systems Approach to Planning, Scheduling and Controlling* (Wiley, 10th edition, 2009) ISBN 978-0470278703

Posner K – *Project Management Pocketbook* (Management Pocketbooks, 2008) ISBN 978-1903776872

### Journals

Edited by Bredillet C N, PhD – *Project Management Journal* (Wiley Online Library & Project Management Institute) ISSN: 1938-9507

Edited by Turner J R – *International Journal of Project Management* (Elsevier, Association for Project Management & International Project Management Association) ISSN 0263-7863

Edited by Hiebert R – *Public Relations Review* (Elsevier) ISBN ISSN: 03638111

**Case studies**

Public Relations Society of America Silver Anvil Award Winners (requires free signup): <http://www.prsa.org/Awards/Search>

Issue Management Council: <http://issuemanagement.org/case-studies/>

**Websites**

<a href="http://www.businessballs.com/project.htm">www.businessballs.com/project.htm</a>	Business Balls – critical path analysis
<a href="http://www.ganttchart.com">www.ganttchart.com</a>	Gantt Chart (project management)
<a href="http://www.projectsmart.co.uk/introduction-to-project-management.html">www.projectsmart.co.uk/introduction-to-project-management.html</a>	Project Smart –introduction to project management
<a href="http://www.projectsmart.co.uk/creating-a-gantt-chart-using-excel.html">www.projectsmart.co.uk/creating-a-gantt-chart-using-excel.html</a>	Project Smart – creating a Gantt chart using Excel

## Unit 25: Agree a budget

Unit code:	J/601/2552
QCF Level 3:	BTEC Professional
Credit value:	4
Guided learning hours:	25

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### Unit aim

This unit is about developing and agreeing a budget for a department or section within a business.

### Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

### Unit introduction

Learners will develop an understanding of how to prepare a budget outlining the cost of a public relations programme or project and agree that budget with the commissioning client or internal manager. An organisation will likely have a set amount of money allocated to public relations so it is important to agree a budget for the proposed public relations programme to ensure that the aims can be achieved with the available funds.

The budget will be an accurate description of the cost of achieving the desired aims of the project and will be signed off before the project commences. The unit will cover what to include in a draft budget, how to use estimations and how to identify priorities when preparing a budget.

Budgets may need to be revised to meet the client's needs so learners will also cover how to review a budget, evaluate and justify estimated costs and negotiate a new budget.

Finally, learners will develop the skills needed for agreeing budgets.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand how to develop budgets</p>	<p>1.1 Explain how to use estimations when developing a draft budget</p> <p>1.2 Explain how to identify priorities and financial resources needed when preparing a budget</p> <p>1.3 Explain the purpose and benefits of identifying priorities when preparing a budget</p> <p>1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income</p> <p>1.5 Describe procedures for negotiating superseded budgets</p> <p>1.6 Describe skills needed for agreeing budgets</p>
<p>2 Be able to agree a budget</p>	<p>2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget</p> <p>2.2 Evaluate and justify costs and risks</p> <p>2.3 Prepare a draft budget</p> <p>2.4 Negotiate and agree a budget</p>

## Unit content

### 1 Understand how to develop budgets

*Developing a draft budget:* type of budget, e.g. zero-based budgets, imposed budgets, inflation adjusted historical budgets, percentage of sales budgets; priorities for achieving project aims; estimate costs, e.g. obtain quotes, cost of previous similar activity, staff time spent on project to calculate fees; researching external costs, e.g. suppliers, venues, external experts, photography; administration costs, e.g. detailed or percentage; importance of contingency; public relations-specific budgets, e.g. fee rates, cost of outputs, rechargeable costs, industry mark-up, profit margin, retainer and project-based options; difference between retainer and project budgets

*Purpose and benefits of identifying priorities when preparing a budget:* critical activities (so funds are spent on elements needed to achieve project aim); optional activities; menu option, e.g. include critical costs as standard with additional costs for extras that client or internal manager may choose; costing outputs

*Purpose and benefits of evaluating and justifying estimated costs and income:* expected return on investment; commitment to pay

*Procedures for negotiating superseded budgets:* prioritise elements needed to achieve project aim and remove others if necessary; reassess staff hours needed on each element; present reviewed budget highlighting impact on overall aim; regular budget status meetings

*Skills needed for agreeing budgets:* clarity; persuasion; explanation, e.g. expected return on investment, amount of media coverage or advertising value equivalent (AVE), number of stakeholders reached by campaign

### 2 Be able to agree a budget

*Financial resources:* staff fees and rates; external costs, e.g. suppliers, venues, external experts, photography; administration costs, e.g. detailed or percentage

*Costs and risks:* justify estimated costs assigned to each activity; identify risks of final cost being higher; contingency

*Prepare a draft budget:* researching costs of activities; collating costs into a spreadsheet, e.g. Excel; presenting budget as related to public relations proposal or programme

*Negotiate and agree a budget:* meeting to explain budget and expected return on investment (ROI); final agreement of activities to be included in the programme; confirmation of agreed budget; set regular budget reviews

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 26: Manage Budgets	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace.

Given that agreeing and managing budgets is often carried out by more experienced public relations professionals than the learner, the skills could be developed through enabling learners to assist a more experienced colleague who is agreeing and managing a budget for a current public relations programme. Alternatively, the learner could be assigned a project for which they are then responsible for agreeing the budget.

To help learners practise, they could be given public relations proposals for previous campaigns which detail the activities but not the budget. Learners could then estimate costs, reviewing these against the original and simulate agreeing a budget with a manager. Learners may also benefit from a tutorial on types of budget, with reference to public relations, reporting methods (forecast versus actual) and presenting and explaining budgets to managers.

The complexity of budgets expected at this level would be a line-by-line budget detailing costs of staff fees, administration costs, costs of implementing chosen activities, for example venue costs plus contingency. The budget would have the line costs totalled to an overall budget cost. The budget would include a contingency line to allow for unexpected spend or overspend. The contingency would be an appropriate figure based on the project or a percentage of the overall budget, for example 10 per cent.

Learners should understand impacts on a budget are not purely financial but also include human and time resources, so all areas should be monitored to ensure the project is delivered within the agreed budget.

### Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. This is a Council for Administration (CfA) unit and therefore the Assessment Strategy for Business and Administration document must be followed; please see *Annexe G*.

Evidence is likely to be in a variety of forms which could include records of draft and actual budgets, meetings, plans, reflective journals, professional discussion and questioning, records of observations made by the assessor and witness testimonies from colleagues and managers.

The assessment evidence for learning outcome 1 could be supported by a spreadsheet which includes line-by-line costs of activities totalling to an overall cost. If this evidence method is chosen, the learner should explain how the activities relate to the PR project or programme that has been commissioned. Ideally, the budget should form part of a public relations proposal outlining both the activities and the costs. Learners could explain how the budget was compiled, how the activities in the budget will help deliver the aim of the project and how the activity costs were arrived at. The costs, while estimated, should be fairly accurate to give an accurate overall budget. Learners should also be able to state which activities could be reduced or removed and still achieve the aims of the project.

The assessment evidence for learning outcome 2 could include records of presenting the budget to the commissioning client or manager and their final acceptance of the budget. This could be emails or records of meetings, and may include revisions of the budget by the learner based on feedback. Learners should be able to explain why they made the revisions. Evidence might include a signed copy of the budget or email acceptance.

## Resources

### Books

Brookson S – *Managing Budgets* (Dorling Kindersley, 2000) ISBN 978-0751307719

### Websites

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations  
(CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association  
(PRCA)



# Unit 26: Manage budgets

Unit code:	T/601/2580
QCF Level 4:	BTEC Professional
Credit value:	5
Guided learning hours:	29

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## Unit aim

This unit is about managing and monitoring a budget for a department or section within an organisation.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

A successful public relations practitioner needs to be able to manage the cost of executing a public relations programme or campaign as well as implementing the actual campaign. The purpose of this unit is to teach learners about the cost allocated to delivering the campaign, called a budget, and how to manage the budget.

A budget will be agreed in advance and it is very important that the public relations practitioner ensures the cost of delivering the campaign does not exceed the budget or there is a chance that the costs will not be paid by the organisation, or they will have to secure more money to cover the cost.

This unit will cover how to manage the budget, how to track and report performance against the agreed budget and how to manage and monitor budgets. In doing this, the public relations programme will be delivered at the cost agreed with the organisation and fit within the organisation's overall business budget.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
1 Understand the purpose of budgets	1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently 1.2 Identify legal, regulatory and organisational requirements for managing a budget 1.3 Describe different types of budgetary systems and their features
2 Understand how to manage budgets	2.1 Describe methods for monitoring, controlling and recording income and expenditure 2.2 Describe ways in which costs may be minimised in own area of responsibility 2.3 Identify situations in which corrective action may be needed 2.4 Describe the scope of own authority for managing a budget and authorising expenditure
3 Understand how to report performance against budgets	3.1 Explain the purpose and benefits of reporting information on performance against budget 3.2 Explain how to check the accuracy of budget calculations 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets
4 Be able to manage budgets	4.1 Control budget performance within limits and deadlines 4.2 Analyse and take action to minimise costs where possible 4.3 Take corrective action to make sure of best value for money 4.4 Authorise expenditure within the scope of own authority

Learning outcomes	Assessment criteria
5 Be able to monitor budgets	5.1 Record transactions, as required 5.2 Produce information on performance against budget, when required 5.3 Make sure all calculations are accurate 5.4 Record information that will help with the preparation of future budgets

## Unit content

### 1 Understand the purpose of budgets

*Budgets purpose:* public relations activities/programmes as part of business spend; budget control/no overspend; competitive costs; efficient payment;

*Budgets considerations:* legal requirements, e.g. VAT; regulatory requirements; organisation requirements, e.g. timesheets

*Budgetary systems:* types and strengths and weaknesses of budgetary systems, e.g. zero-based budget, percentage of sales budget, historical adjust for inflation budget; features; project management tools; proprietary systems; desktop reporting and analysis

### 2 Understand how to manage budgets

*Managing budgets:* quotes, e.g. obtaining several for comparison and negotiation; invoices; contracts; spreadsheets; overspend; contingency; expected responsibility for expenditure; limits of authority; tracking expenditure; agreeing expenditure; corrective action; cost mitigation

### 3 Understand how to report performance against budgets

*Importance of reporting performance against budgets:* actual expenditure versus estimated costs, e.g. costs of final video edit versus initial quote; overspend; under servicing and over servicing, e.g. less or more time spent on the project than budgeted for; payment for expenditure; records to help future budgeting

### 4 Be able to manage budgets

*Demonstrate budget management:* expenditure; cost mitigation; project management; supplier management; monthly or periodic reports; over servicing and under servicing; limits of authority; corrective action

### 5 Be able to monitor budgets

*Demonstrate budget monitoring:* expenditure tracking; budget reconciliation; accurate and timely recording, e.g. cross checking figures; reporting; maintain records to help future budgeting

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
Unit 25: Agree a Budget	Unit 2: Understanding Public Relations	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace. As such learners should demonstrate that they are able to perform to the assessment standard reliably over time. The unit requires learners to access a project management system or budget tracking tool and demonstrate the knowledge to manipulate it by producing reports which show the performance of time and outputs delivered against a project plan. If working in a public relations agency, the learner may show evidence of using a consultancy business model.

Given that managing budgets is often carried out by more experienced public relations professionals than the learner, the skills could be developed through enabling learners to assist a more experienced colleague who is managing a budget for a current public relations programme. To aid delivery, learners could be assigned the task of recording and tracking expenditure on a project within an already agreed budget and gain detailed knowledge of an appropriate reporting system. They could be asked to identify when they perceive risks to over spending and suggest mitigation to keep costs within the budget. Alternatively, they could be given a project for which they are responsible for managing the budget.

Learners should be able to manage and monitor a detailed budget expected at this level, with a line-by-line budget detailing costs of staff fees, administration costs, costs of implementing chosen activities, for example venue costs plus contingency. They should have access to a project management tool, budgetary system or Excel spreadsheet to enable them to record the actual costs alongside estimated costs and have sufficient skills to evaluate where there is a difference and how this will affect the overall budget.

### Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. This is a Council for Administration (CfA) unit and therefore the Assessment Strategy for Business and Administration document must be followed; please see *Annexe G*.

Evidence is likely to be in a variety of forms including records of meetings, plans, reflective journals, professional discussion and questioning, records of observations made by the assessor and witness testimonies from colleagues and managers. Sources of evidence, appropriate to the learner's job role, may include budgets, financial records, correspondence and calculations.

Evidence of managing a budget should be shown by costs such as invoices, receipts, monthly performance reports or timesheets which fit within the original agreed budget. Where applicable, evidence of obtaining several quotes to find a competitive cost should be shown. Ideally, learners should show that the project falls within the agreed budget or, if not, give reasons why there is overspend which has been agreed with the organisation.

Evidence of monitoring a budget should be an Excel spreadsheet or budgeting system which shows the estimated spend versus the actual spend and the difference. Learners should be able to explain the spreadsheet and reasons for the variances in spend. They should be able to state points of learning for creating a more accurate budget next time, for example allowing for additional spend for editing a film or an extra day's work due to necessary revisions to documents.

## **Resources**

### **Book**

Brookson S – *Managing Budgets* (Dorling Kindersley, 2000) ISBN 978-0751307719

### **Websites**

[www.cipr.co.uk](http://www.cipr.co.uk)

Chartered Institute of Public Relations (CIPR)

[www.prca.org.uk](http://www.prca.org.uk)

Public Relations Consultants Association (PRCA)

# Unit 27: Negotiation and Influencing

Unit code: A/502/4428  
QCF Level 4: BTEC Professional  
Credit value: 6  
Guided learning hours: 30

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## Unit aim

This unit aims to build high level negotiation and influencing skills through understanding of the principles and reflective practice.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

Negotiation and influencing skills are crucial to developing effective public relations practice whether influencing companies or the public via social media, negotiating and influencing in campaign work, or in developing links with outside agencies and individuals. This unit explores the aims and principles of negotiating and influencing skills, with an emphasis on techniques and their application to public relations situations. Learners should be able to develop a sound understanding of how to apply negotiating and influencing skills in public relations situations, whilst demonstrating a sound knowledge through applying these skills in the workplace.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand the aims and principles of effective negotiation and influencing skills	1.1 Assess the factors that influence complex business negotiations 1.2 Explain stages in the negotiation process 1.3 Evaluate the basis of power to influence negotiations externally and internally at work
2 Know a variety of negotiation and influencing techniques and when they should be used	2.1 Evaluate a variety of influencing and negotiating techniques including an explanation of when they might be used
3 Be able to demonstrate effective negotiation and influencing skills based on reflective practice	3.1 Successfully tackle and record a complex business negotiation or problem 3.2 Analyse use of negotiation and influencing skills 3.3 Evaluate how approaches and outcomes have evolved based on experience 3.4 Develop an action plan to improve practice 3.5 Cascade findings to line manager and colleagues within their area of responsibility

## Unit content

### 1 Understand the aims and principles of effective negotiation and influencing skills

*Aims and principles of negotiation and influencing:* public relations situations required, e.g. media relations, special events, speaking engagements, sponsorships, employee relations, community relations; negotiation goals; stages in the negotiation process; hierarchy of negotiation, including impact on negotiation tone when dealing with clients, employees and an audience; internal and external power and persuasion, e.g. seniority, perceived influence, levels of authority, risk evaluation, background research; influencing model; communication model, e.g. Grunig's four models of public relations, 4 Networked communication models

*Persuading, influencing and negotiating skills in public relations:* influencing skills; effective listening; speech structure; dealing with tough questions; recognising client behaviour including non-verbal behaviour; personal skills, e.g. building alliances and rapport, risk taking, assertiveness, diplomacy; attitudes, e.g. polite, open and defensiveness, focused, sensitive, persuasive

*Factors impacting on public relations negotiations:* factors, e.g. balance of power, culture and reputation, expectations, significance of outcome, timing, location and environment, permanent and temporary team dynamics, relationship awareness (between individuals, personalities, stakeholders, resources, logistics); factors that can or cannot be changed to affect outcomes

### 2 Know a variety of negotiation and influencing techniques and when they should be used

*Persuading, influencing and negotiating techniques:* advantages and disadvantages of different approaches, e.g. distributive, competitive, collaborative, integrative, interests-based negotiation, position-based negotiation; calibration (measuring strategies and making calculated decisions by gauging client behaviour)

*Public relations situations requiring negotiation and influencing techniques:* negotiating deadlines and workloads, e.g. with clients, colleagues, managers; negotiating media placement of stories, e.g. where it appears in a publication (on and offline media), when it appears (date, time, duration); negotiating sponsorship opportunities; influencing the media to run a particular story; influencing clients to go with a particular idea or campaign tactic; persuading colleagues to support own ideas; influencing bloggers; using social media to influence an audience; negotiate prices with supplier, e.g. advertorial

### 3 Be able to demonstrate effective negotiation and influencing skills based on reflective practice

*Post-negotiation phase:* evaluating outcomes achieved against public relations aims and objectives; reviewing achieved outcomes; analysing team and individual performance; composing a reflective log; action plans to improve practice; sharing results with relevant internal parties

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations  Unit 13: Develop Working Relationships with Colleagues and Stakeholders  Unit 18: Understanding Client Relationships in Public Relations  Unit 28: Develop, Maintain and Review Personal Networks	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is a practical unit in which learners will develop their skills and demonstrate competence in the workplace. As this unit explores negotiation and influencing skills for public relations, learners should be able to access a range of learning techniques to develop an awareness of negotiating and influencing principles, aims and skills.

Learners will need to acquire and apply skills in a range of public relations contexts, including experience of negotiating and influencing colleagues and senior managers, journalists and bloggers, existing and potential clients (senior and junior), specialists (for example photographers, printers, designers) and other stakeholders (for example caterers, security, venue management, staging people). Learners should become familiar with the differences in communicating with different audiences and their application in a range of industry contexts. Learners may be given a 'live brief' or scenario to develop a public relations campaign with an emphasis on negotiating and influencing in a range of campaign contexts. This could include developing relationships, navigating the campaign, dealing with the media and client, and preparing the campaign itself using a range of mediums including new media technologies.

Learning outcome 1 focuses on defining and evaluating the aims and principles of effective negotiating and influencing skills. It would be useful for relevant public relations professionals to speak to learners about the importance and significance of negotiating and influencing skills. Learners should be given opportunities to research negotiation, influencing and communication models and relate these to a public relations scenario that they might experience at work.

Learning outcome 2 looks specifically at negotiation and influencing techniques and learners should be encouraged to develop their thinking and problem-solving skills in connection to this learning outcome. Learners could be given a range of public relations influencing and negotiation scenarios and asked to match techniques to public relations context, whilst having to provide a full justification for their choices. This could be developed further by facilitating a group feedback session, where learners discuss each other's evaluations.

Learning outcome 3 focuses on the demonstration of effective negotiation and influencing skills using a reflective practice framework. Learners could enter into role play with a public relations 'problem' they have to resolve using their negotiating and influencing skills. This could be acted out with the tutor completing a comprehensive presentation record, or learners could be encouraged to film their role play. Learners should maintain a reflective account or log so they are able to compile an action plan based on their reflections.

Learners should be encouraged to shadow colleagues in their workplace to observe how influencing and negotiating skills and techniques are put into practice. It would be helpful for them to discuss planned approaches in advance and evaluate their success afterwards.

## Assessment

This unit must be assessed in the workplace, or conditions resembling the workplace. The Assessment Requirements for Level 4 Diploma in Public Relations (QCF) document must be followed; please see *Annexe E*.

Evidence is likely to be in a variety of forms including records of meetings, plans, reflective journals, professional discussion and questioning, records of observations made by the assessor and witness testimonies from colleagues and managers.

For learning outcome 1, learners could present their findings as a talk, justifying their chosen approaches with reference to a specific public relations context, either a public relations campaign they have worked on or referencing negotiation or influencing situations they have experienced or observed in the workplace.

Learning outcomes 2 and 3 could be evidenced through observation records or witness testimony for a number of public relations influencing and negotiation scenarios. The assessment could include the learner's initial summary of the situation and what approach to take, with an effective evaluation of a wide range of influencing and negotiation techniques and their suitability to the given situation. Learners could document the effectiveness of the approaches taken and reflect on their ability to carry them out. Throughout the process, learners could maintain a reflective account which should then be used to develop an action plan to improve practice. Learners should show evidence of how this has been communicated to their line manager and relevant colleagues. To demonstrate the full range required for the unit, this approach should be repeated for a range of influencing and negotiating scenarios.

## Resources

### Books

- Burton L, Dalley D, Greenhall M – *Developing Your Influencing Skills: How to Influence People by Increasing Your Credibility, Trustworthiness and Communication Skills* (Universe of Learning Ltd, 2010) ISBN 978-1849370226
- Gates S – *The Negotiation Book: Your Definitive Guide to Successful Negotiation* (John Wiley & Sons, 2010) ISBN 978-0470664919
- Gregory A – *Planning and Preparing Public Relations Campaigns: A strategic approach (PR in Practice), 3rd Edition* (Kogan Page, 2010) ISBN 978-0749451080
- Fisher R and Ury W – *Getting to Yes: Negotiating Agreement Without Giving In* (Penguin Overseas Editions, 2011) ISBN 978-0143118756
- McRae B – *Negotiating and Influencing Skills: The Art of Creating and Claiming Values* (Illustrated Edition) (Sage Publications, 1997) ISBN 978-0761911852
- Regester M – *Risk Issues and Crisis Management in Public Relations: A casebook of best practice* (PR in Practice) 3rd Edition (Kogan Page, 2008) ISBN 978-0749451073
- Tench R, Yeomans L – *Exploring Public Relations 2nd Edition* (Financial Times/Prentice Hall, 2009) ISBN 978-0273715948

### Websites

- |  |   |
|--|---|
| <a href="http://www.cipr.co.uk">www.cipr.co.uk</a>             | Chartered Institute of Public Relations (CIPR)  |
| <a href="http://www.pon.harvard.edu/">www.pon.harvard.edu/</a> | The Program on Negotiation at Harvard Business School - free resources and a free weekly e-zine |
| <a href="http://www.prca.org.uk">www.prca.org.uk</a>           | Public Relations Consultants Association (PRCA)   |

# Unit 28: Develop, Maintain and Review Personal Networks

Unit code:	R/600/9587
QCF Level 4:	BTEC Professional
Credit value:	4
Guided learning hours:	25

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## Unit aim

This unit helps learners to develop, maintain and review networking relationships based on personal contacts.

## Competency unit assessment guidance

This unit should be assessed predominantly in the workplace.

## Unit introduction

Networking is an essential skill to have within the public relations industry. It is not just about building relationships but also maintaining them and getting the most from them. When used effectively, networking can assist public relations professionals in their career progression as employers recognise that someone with strong networking skills will benefit them by raising their business's profile, bringing in new clients and skills. They also recognise that someone who has demonstrated networking skills will have a good level of confidence, know how to conduct themselves appropriately and will probably go far in their career.

On completion of this unit, learners will understand the importance and benefits of developing a personal network of contacts for their public relations work and professional career. They will be able to set up and review their own networks, being aware of and using a variety of physical and virtual networking opportunities.

The need for data protection, confidentiality and ethics are common themes within the unit. Learners will understand the importance of these themes in relation to how they build and maintain their personal networks.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
<p>1 Understand the benefits of networking and the need for data privacy</p>	<p>1.1 Evaluate the benefits of networking with individuals and organisations</p> <p>1.2 Identify individuals and organisations that would provide benefits to own organisation and networks</p> <p>1.3 Explain the need for confidentiality with networking contacts</p>
<p>2 Be able to develop a personal network of contacts</p>	<p>2.1 Develop networks that will provide personal and organisational benefit</p> <p>2.2 Develop guidelines for working with networks in line with organisational procedures</p>
<p>3 Be able to review networking relationships</p>	<p>3.1 Assess the value own current personal network</p> <p>3.2 Evaluate own experience with existing contacts and use these to inform future actions</p>

## Unit content

### 1 Understand the benefits of networking and the need for data privacy

*Networking:* definition, e.g. planning, communication, follow-up; characteristics of a good contact; networking with individuals and external organisations; maximising opportunities to network; public relations networking aims, e.g. key organisation contacts, information expansion, reputation enhancement, reciprocal relationships, establishing personal credibility and trustworthiness; use of social media in networking; strategy, e.g. research, planning; understanding that networking is long-term relationship building and not selling

*Benefits:* benefits for the individual, e.g. short term, long term, career development, progression, professional development; benefits for the organisation, e.g. helping to protect or promote organisation or clients, winning new business, developing new contacts; benefits for the contact; identifying beneficial key contacts, e.g. industry insiders, journalists, internal and external, second-level contacts (contacts-of-contacts), partnerships; contact value, e.g. prioritisation, goal relevance

*Data privacy:* legal considerations, e.g. data protection, personal information management, slander, libel; need for confidentiality; consequences of breach of confidentiality; confidential storage methods of contacts (physical, electronic); ethical considerations, e.g. principled communication, information management, database management, sensitive information, crisis control, reputation management

### 2 Be able to develop a personal network of contacts

*Personal network:* portfolio of contacts, e.g. organisational sources, experts, reciprocal partners, media, suppliers; define network goals, e.g. approaching key contacts, personal introduction, quality communication; relationship-building with contacts; keep up to date with contacts; using professional bodies to network (linked to own area of work); digital networking, e.g. social media channels, blogs; record of contact interaction; for personal benefit; for organisation benefit

*Guidelines and governance:* organisational procedures, e.g. bribery policy, code of ethics, code of conduct; hierarchy and corporate structures, e.g. individual roles, contact structures, internal and external communication

### 3 Be able to review networking relationships

*Value of personal networks:* importance of depth compared to breadth of contacts; relate network to goals, e.g. personal benefit, organisation benefit; network effectiveness, e.g. contact relevance, seniority and influence of contacts; review networking approach, e.g. planning, organisation and follow-up

*Evaluate networking experience:* reflection on use and value of personal contacts, e.g. recognising successes; reflection on confidence in networking; review activity in the marketplace; reassess contacts after changes in own circumstances or goals; action plan for developing and updating network of relevant contacts

## Guidance

### Links to other BTEC units

The learning outcomes in this unit are closely linked with the following units in the qualification:

Level 3	Level 4	Level 5
n/a	Unit 2: Understanding Public Relations Unit 3: Understanding the Use of the Written Word for Public Relations Unit 5: Understanding the Media Landscape Unit 7: Delivering and Evaluating Public Relations Campaigns Unit 13: Develop Working Relationships with Colleagues and Stakeholders Unit 27: Negotiation and Influencing	n/a

### Essential requirements

There are no special resources needed for this unit.

### Delivery

This is predominantly a practical unit in which learners will develop their skills and demonstrate competence in the workplace. However, most learners would benefit from some formal classroom delivery on the benefits of networking with individuals and organisations, how to research contacts, and legal considerations and ethics when setting up a personal network. Learners should be encouraged to attend a variety of networking events, such as those offered by professional bodies, and they would benefit from shadowing a more experienced colleague to see the skills put into practice.

This unit would benefit from being delivered after units covering public relations techniques, such as media relations and public relations campaigns, so learners understand how a personal network of contacts can aid these tasks.

Delivery should enable learners to develop their skills gradually over a period of time. In the early stages, the support of an experienced colleague would provide an opportunity for learners to start to build the relevant skills, knowledge and confidence. A tutor-led discussion to look at how learners can select appropriate networking opportunities, and address ways to overcome challenges such as arriving, 'working a room' effectively, overcoming nerves, joining groups and moving on, will give the group the opportunity to discuss and share their experiences and good practice.

As much as possible, delivery should revolve around real-life situations and case studies. Centres are encouraged to organise talks from key stakeholders such as specific industry professionals including journalists, internal and external key contacts. Learners will also benefit from the opportunity to experience the broadest variety of networking methods. Setting up case studies in which learners use the various methods would equip them with the tools to use the methods and also to identify which method would be most suitable. It is important that delivery equips learners with the tools to effectively follow up on contacts made to develop their personal network for their own and their organisation's benefit.

A light-hearted activity which will aid learner confidence involves setting up 'speed-networking' sessions whereby learners are sat opposite each other in pairs at set tables. Learner one remains seated throughout the session and learner two will move around the set tables where the learner ones are sat. Learner two will have two minutes to network, after which they move on to the next learner one table – this is then repeated so learner two remains seated and learner one moves round the tables.

Constructive feedback and reflection are important learning tools to ensure that learners build on good practice and identify scope for improvement.

## Assessment

This unit must be assessed in the workplace, and simulation for this unit is not permitted. This is a Management Standards Centre unit and therefore the MSC Assessment Strategy for Management and Leadership document must be followed; please see *Annexe F*.

Evidence is likely to be in a variety of forms including records of meetings, research notes, a network portfolio plan, reflective journals, professional discussion and questioning, records of observations made by the assessor and witness testimonies from colleagues and managers.

For learning outcome 1, learners could present their network portfolio plan, including how they researched contacts, attributes that made a contact suitable for adding to their network, how the contacts will bring benefits to own organisation and self, and how the learner will benefit the contact. Learners should demonstrate an awareness of the need for reciprocal relationships that do not purely benefit themselves, but also their organisation.

For learning outcome 2, learners could produce contact reports indicating when and where contacts were made. Evidence may also come from examples of where they have used social media interactions including blogging and email exchanges (with permission from contact) or information from the learner's LinkedIn profile showing good quality, relevant contacts. If appropriate, testimonials from contacts may also be used. A scenario could include asking learners to write an article for an industry magazine on how they have developed a personal network, including the guidelines they developed for working with networks. Alternatively, learners could visit a business networking organisation and 'guest present' with their networking strategy.

For learning outcome 3, learners need to demonstrate their evaluation skills and ability to use the evidence from evaluation to inform future actions. This could take the form of a reflective account, evidence of how the learner has reassessed their contacts after changes in their own circumstances or goals, and a completed action plan for developing and updating their network of relevant contacts.

The tutor can devise an assessment plan that fits the needs of the learner and the opportunities available in the workplace.

Evidence of achievement should be collected in a paper-based or electronic portfolio and referenced against the assessment criteria.

## Resources

### Books

D'Souza S – *Brilliant Networking: What the Best Networkers Know, Say and Do, 2nd Edition* (Pearson Business, 2010) ISBN 978-0273743217

Misner I, Alexander D and Hilliard B – *Networking Like a Pro: Turning Contacts into Connections* (Entrepreneur Press, 2010) ISBN 978-1599183565

Sargent E and Fearon T – *How You Can Talk To Anyone In Every Situation* (Pearson Life, 2010) ISBN 978-0273735717

Townsend H – *Guide to Business Networking: How to Use the Power of Online and Offline Networking for Business Success* (Financial Times/Prentice Hall, 2011) ISBN 978-0273745822

### Websites

<a href="http://www.britishchambers.org.uk">www.britishchambers.org.uk</a>	British Chamber of Commerce
<a href="http://www.bni.eu/uk/">www.bni.eu/uk/</a>	Business Networking
<a href="http://www.cipr.co.uk">www.cipr.co.uk</a>	Chartered Institute of Public Relations (CIPR)
<a href="http://www.ecademy.com">www.ecademy.com</a>	Ecademy – business networking platform
<a href="http://www.linkedin.com">www.linkedin.com</a>	LinkedIn – professional network
<a href="http://www.prca.org.uk">www.prca.org.uk</a>	Public Relations Consultants Association (PRCA)

## Further information

For further information about the qualification featured in this specification, or other Pearson qualifications, please call Customer Services on 0844 576 0045 (calls may be monitored for quality and training purposes) or visit our website ([www.edexcel.com](http://www.edexcel.com)).

## Useful publications

Related information and publications include:

- Equality Policy
- Information Manual (updated annually)
- Reasonable Adjustment and Special Considerations for BTEC and Edexcel NVQ Qualifications
- Recognition of Prior Learning Policy
- Quality Assurance Handbook (updated annually).

Publications on the quality assurance of BTEC qualifications is on our website at [www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx](http://www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx)

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to [www.edexcel.com/resources/publications/home.aspx](http://www.edexcel.com/resources/publications/home.aspx)

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

## Professional body contact details

Skills CFA  
(formerly Council for Administration)

6 Graphite Square  
Vauxhall Walk  
London  
SE11 5EE

Telephone: 0207 091 9620  
Fax: 0207 091 7340  
Email: [info@skillscfa.org](mailto:info@skillscfa.org)  
Website: [www.skillscfa.org](http://www.skillscfa.org)

Public Relations Consultants  
Association (PRCA)

1st Floor  
17-23 Willow Place  
London  
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Telephone: 020 7233 6026  
Fax: 020 7828 4797  
Email: [info@prca.org.uk](mailto:info@prca.org.uk)  
Website: [www.prca.org.uk](http://www.prca.org.uk)

# Professional development and training

Edexcel supports UK and international customers with training related to 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 in effective and efficient quality assurance systems.

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

Our customer service number is:

Work-based learning: 0844 576 0045

Calls may be recorded for quality and training purposes. For further customer contact details please see our website: <http://www.edexcel.com/Aboutus/contact-us/Pages/home.aspx>

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training is underpinned by the LSIS standards for those preparing to teach and for those seeking evidence for their continuing professional development.

# Annexe A

## The Edexcel/BTEC qualification framework for the public relations sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC professional/specialist courses	NVQ/occupational
7			Edexcel BTEC Level 7 Award/Certificate/Diploma/Extended Diploma in Strategic Management and Leadership (QCF)	Edexcel Level 7 Diploma in Management (QCF)
6				
5		Edexcel BTEC Level 5 HND Diploma in Business (Management) (QCF)	BTEC Level 5 Award in Management and Leadership (QCF)	Edexcel Level 5 Diploma in Management (QCF)
4		Edexcel BTEC Level 4 HNC Diploma in Business (QCF)	Edexcel BTEC Level 4 Diploma in Public Relations (QCF)	

<b>Level</b>	<b>General qualifications</b>	<b>BTEC full vocationally-related qualifications</b>	<b>BTEC professional/specialist courses</b>	<b>NVQ/occupational</b>
<b>3</b>	<p>Edexcel GCE in Applied Business</p> <p>Edexcel GCE in Business Studies</p> <p>Edexcel GCE in English Language</p> <p>Edexcel GCE in English Language and Literature</p> <p>Edexcel GCE in English Literature</p>	<p>Edexcel BTEC Level 3 National Certificate/Subsidiary Diploma/90-credit Diploma/Diploma/Extended Diploma in Business (QCF)</p> <p>Edexcel BTEC Level 3 National Certificate/Subsidiary Diploma/90-credit Diploma/Diploma/Extended Diploma in Creative Media Production (QCF)</p> <p>Edexcel BTEC Level 3 National Certificate/Subsidiary Diploma/90-credit Diploma/Diploma/Extended Diploma in IT (QCF)</p>	<p>Edexcel BTEC Level 3 Certificate in Creative and Digital Media (QCF)</p> <p>Edexcel BTEC Level 3 Award/Certificate in Management (QCF)</p> <p>Edexcel BTEC Level 3 Certificate in Principles of Marketing (QCF)</p> <p>Edexcel BTEC Level 3 Certificate in Marketing (QCF)</p>	<p>Edexcel Level 3 NVQs in Business and Administration (QCF)</p> <p>Edexcel Level 3 Certificate in Management (QCF)</p> <p>Edexcel Level 3 NVQ Diploma in Marketing (QCF)</p>
<b>2</b>	<p>Edexcel GCSE in Applied Business</p> <p>Edexcel GCSE in Business Studies</p> <p>Edexcel GCSE in English Language</p> <p>Edexcel GCSE in English Literature</p>	<p>Edexcel BTEC Level 2 First Certificate/Extended Certificate/Diploma in Business (QCF)</p> <p>Edexcel BTEC Level 2 First Certificate/Extended Certificate/Diploma in Creative Media Production (QCF)</p> <p>Edexcel BTEC Level 2 First Certificate/Extended Certificate/Diploma in IT (QCF)</p>	<p>Edexcel BTEC Level 3 Certificate in Principles of Marketing (QCF)</p> <p>Edexcel BTEC Level 2 Certificate in Marketing (QCF)</p>	<p>Edexcel Level 2 NVQs in Business and Administration (QCF)</p> <p>Edexcel Level 2 NVQ Certificate in Marketing (QCF)</p> <p>Edexcel Level 2 Certificate in Team Leading (QCF)</p>

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC professional/specialist courses	NVQ/occupational
1				Edexcel Level 1 NVQs in Business and Administration (QCF)



# Annexe B

## **Wider curriculum mapping**

Edexcel BTEC Level 4 Professional qualifications give learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

## **Spiritual, moral, ethical, social and cultural issues**

Throughout the delivery of this qualification learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

## **Citizenship**

Learners undertaking this qualification will have the opportunity to develop their understanding of citizenship issues.

## **Environmental issues**

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

## **European developments**

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

## **Health and safety considerations**

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

## **Equal opportunities issues**

There will be opportunities throughout this qualification to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.



# Annexe C

## Level 2 Functional Skills mapping

The following grids identify potential opportunities for development of Level 2 Functional Skills.

**Key:**

- ✓ indicates opportunities for development
- a blank space indicates no opportunities for development

**Mandatory units**

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>English – Speaking, Listening and Communication</b>														
Make a range of contributions to discussions in a range of contexts, including those that are unfamiliar, and make effective presentations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>English – Reading</b>														
Select, read, understand and compare texts and use them to gather information, ideas, arguments and opinions	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓		✓
<b>English – Writing</b>														
Write a range of texts, including extended written documents, communicating information, ideas and opinions, effectively and persuasively	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>Mathematics – Representing</b>														
Understand routine and non-routine problems in familiar and unfamiliar contexts and situations												✓		
Identify the situation or problems and identify the mathematical methods needed to solve them						✓						✓		
Choose from a range of mathematics to find solutions						✓						✓		
<b>Mathematics – Analysing</b>														
Apply a range of mathematics to find solutions						✓			✓			✓		
Use appropriate checking procedures and evaluate their effectiveness at each stage						✓			✓			✓		

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>Mathematics – Interpreting</b>						✓				✓		✓		
Interpret and communicate solutions to multistage practical problems in familiar and unfamiliar contexts and situations						✓				✓		✓		
Draw conclusions and provide mathematical justifications						✓			✓	✓			✓	
<b>ICT – Using ICT</b>														
Plan solutions to complex tasks by analysing the necessary stages						✓			✓			✓		
Select, interact with and use ICT systems safely and securely for a complex task in non-routine and unfamiliar contexts					✓	✓			✓			✓		
Manage information storage to enable efficient retrieval				✓	✓	✓	✓	✓	✓	✓		✓	✓	
<b>ICT – Finding and Selecting Information</b>														
Use appropriate search techniques to locate and select relevant information	✓	✓	✓	✓	✓	✓		✓				✓	✓	✓
Select information from a variety of sources to meet requirements of a complex task	✓	✓	✓	✓	✓	✓		✓				✓	✓	✓

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>ICT – Developing, presenting and communicating information</b>														
Enter, develop and refine information using appropriate software to meet requirements of a complex task	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use appropriate software to meet the requirements of a complex data-handling task					✓	✓		✓	✓		✓	✓		
Use communications software to meet requirements of a complex task												✓		
Combine and present information in ways that are fit for purpose and audience	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Evaluate the selection, use and effectiveness of ICT tools and facilities used to present information										✓				

**Optional units**

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	15	16	17	18	19	20	21	22	23	24	25	26	27	28
<b>English – Speaking, Listening and Communication</b> Make a range of contributions to discussions in a range of contexts, including those that are unfamiliar, and make effective presentations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
<b>English – Reading</b> Select, read, understand and compare texts and use them to gather information, ideas, arguments and opinions	✓	✓	✓	✓	✓	✓	✓			✓				✓
<b>English – Writing</b> Write a range of texts, including extended written documents, communicating information, ideas and opinions, effectively and persuasively	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	15	16	17	18	19	20	21	22	23	24	25	26	27	28
<b>Mathematics – Representing</b>														
Understand routine and non-routine problems in familiar and unfamiliar contexts and situations								✓			✓	✓		
Identify the situation or problems and identify the mathematical methods needed to solve them								✓			✓	✓		
Choose from a range of mathematics to find solutions											✓	✓		
<b>Mathematics – Analysing</b>														
Apply a range of mathematics to find solutions								✓			✓	✓		
Use appropriate checking procedures and evaluate their effectiveness at each stage								✓			✓	✓		
<b>Mathematics – Interpreting</b>														
Interpret and communicate solutions to multistage practical problems in familiar and unfamiliar contexts and situations								✓			✓	✓		
Draw conclusions and provide mathematical justifications								✓			✓	✓		

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units													
	15	16	17	18	19	20	21	22	23	24	25	26	27	28
<b>ICT – Using ICT</b>							✓			✓		✓		
Plan solutions to complex tasks by analysing the necessary stages												✓		
Select, interact with and use ICT systems safely and securely for a complex task in non-routine and unfamiliar contexts										✓	✓			
Manage information storage to enable efficient retrieval	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>ICT – Finding and Selecting Information</b>														
Use appropriate search techniques to locate and select relevant information	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Select information from a variety of sources to meet requirements of a complex task	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Level 2 Functional Skill	Edexcel BTEC Level 4 Diploma in Public Relations (QCF) units														
	15	16	17	18	19	20	21	22	23	24	25	26	27	28	
<b>ICT – developing, presenting and communicating information</b>															
Enter, develop and refine information using appropriate software to meet requirements of a complex task	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Use appropriate software to meet the requirements of a complex data-handling task			✓				✓			✓		✓			
Use communications software to meet requirements of a complex task									✓		✓	✓	✓	✓	✓
Combine and present information in ways that are fit for purpose and audience	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Evaluate the selection, use and effectiveness of ICT tools and facilities used to present information															

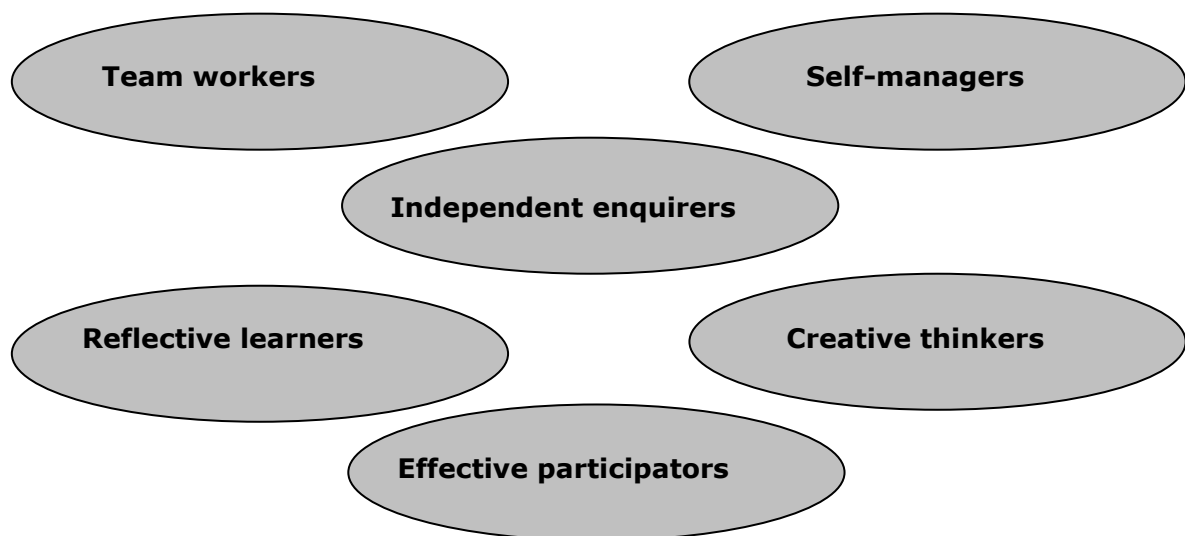
# Annexe D

## Personal, learning and thinking skills mapping

### A FRAMEWORK OF PERSONAL, LEARNING AND THINKING SKILLS 11–19 IN ENGLAND

The framework comprises six groups of skills that are essential to success in learning, life and work. In essence, the framework captures the essential skills of: managing self; managing relationships with others; and managing own learning, performance and work. It is these skills that will enable learners to enter work confident and capable.

The titles of the six groups of skills are set out below.



For each group, there is a focus statement that sums up the range of skills. This is followed by a set of outcome statements that are indicative of the skills, behaviours and personal qualities associated with each group.

Each group is distinctive and coherent. The groups are also interconnected. Learners are likely to encounter skills from several groups in any one learning experience. For example, an independent enquirer would set goals for their research with clear success criteria (reflective learner) and organise and manage their time and resources effectively to achieve these (self-manager). In order to acquire and develop fundamental concepts such as organising oneself, managing change, taking responsibility and perseverance, learners will need to apply skills from all six groups in a wide range of learning contexts.

## The skills

### Creative thinkers

Focus:

People think creatively by generating and exploring ideas, making original connections. They try different ways to tackle a problem, working with others to find imaginative solutions and outcomes that are of value.

Creative thinkers:

- ◇ generate ideas and explore possibilities
- ◇ ask questions to extend their thinking
- ◇ connect their own and others' ideas and experiences in inventive ways
- ◇ question their own and others' assumptions
- ◇ try out alternatives or new solutions and follow ideas through
- ◇ adapt ideas as circumstances change.

### Independent enquirers

Focus:

People process and evaluate information in their investigations, planning what to do and how to go about it. They take informed and well-reasoned decisions, recognising that others have different beliefs and attitudes.

Independent enquirers:

- ◇ identify questions to answer and problems to resolve
- ◇ plan and carry out research, appreciating the consequences of decisions
- ◇ explore issues, events or problems from different perspectives
- ◇ analyse and evaluate information, judging its relevance and value
- ◇ consider the influence of circumstances, beliefs and feelings on decisions and events
- ◇ support conclusions, using reasoned arguments and evidence.

### Reflective learners

Focus:

People evaluate their strengths and limitations, setting themselves realistic goals with criteria for success. They monitor their own performance and progress, inviting feedback from others and making changes to further their learning.

Reflective learners:

- ◇ assess themselves and others, identifying opportunities and achievements
- ◇ set goals with success criteria for their development and work
- ◇ review progress, acting on the outcomes
- ◇ invite feedback and deal positively with praise, setbacks and criticism
- ◇ evaluate experiences and learning to inform future progress
- ◇ communicate their learning in relevant ways for different audiences.

### **Team workers**

**Focus:**

People work confidently with others, adapting to different contexts and taking responsibility for their own part. They listen to and take account of different views. They form collaborative relationships, resolving issues to reach agreed outcomes.

**Team workers:**

- ◇ collaborate with others to work towards common goals
- ◇ reach agreements, managing discussions to achieve results
- ◇ adapt behaviour to suit different roles and situations, including leadership roles
- ◇ show fairness and consideration to others
- ◇ take responsibility, showing confidence in themselves and their contribution
- ◇ provide constructive support and feedback to others.

### **Self-managers**

**Focus:**

People organise themselves, showing personal responsibility, initiative, creativity and enterprise with a commitment to learning and self-improvement. They actively embrace change, responding positively to new priorities, coping with challenges and looking for opportunities.

**Self-managers:**

- ◇ seek out challenges or new responsibilities and show flexibility when priorities change
- ◇ work towards goals, showing initiative, commitment and perseverance
- ◇ organise time and resources, prioritising actions
- ◇ anticipate, take and manage risks
- ◇ deal with competing pressures, including personal and work-related demands
- ◇ respond positively to change, seeking advice and support when needed.

### **Effective participators**

**Focus:**

People actively engage with issues that affect them and those around them. They play a full part in the life of their school, college, workplace or wider community by taking responsible action to bring improvements for others as well as themselves.

**Effective participators:**

- ◇ discuss issues of concern, seeking resolution where needed
- ◇ present a persuasive case for action
- ◇ propose practical ways forward, breaking these down into manageable steps
- ◇ identify improvements that would benefit others as well as themselves
- ◇ try to influence others, negotiating and balancing diverse views to reach workable solutions
- ◇ act as an advocate for views and beliefs that may differ from their own.

## Summary of the PLTS coverage throughout the programme

This table shows where units support the development of personal, learning and thinking skills.

### Key:

- ✓ indicates opportunities for development
- a blank space indicates no opportunities for development

### Mandatory units

Unit	Personal, learning and thinking skills					
	Independent enquirers	Creative thinkers	Reflective learners	Team workers	Self-managers	Effective participators
1	✓			✓	✓	
2	✓	✓	✓			✓
3	✓	✓				
4	✓	✓	✓	✓	✓	✓
5	✓	✓	✓			✓
6	✓	✓		✓	✓	✓
7	✓	✓	✓			
8	✓	✓			✓	✓
9	✓	✓	✓	✓	✓	
10	✓	✓		✓		✓
11	✓				✓	
12	✓	✓		✓		
13	✓	✓	✓		✓	✓
14	✓		✓		✓	

## Optional units

Unit	Personal, learning and thinking skills					
	Independent enquirers	Creative thinkers	Reflective learners	Team workers	Self-managers	Effective participators
15	✓	✓	✓			✓
16	✓	✓	✓	✓	✓	✓
17	✓			✓	✓	✓
18	✓		✓	✓	✓	✓
19	✓	✓				
20	✓			✓		
21		✓	✓	✓	✓	✓
22				✓	✓	✓
23	✓	✓		✓	✓	✓
24	✓		✓		✓	
25	✓		✓			
26	✓					✓
27	✓	✓	✓			✓
28	✓	✓	✓		✓	✓



# Annexe E

## Skills CFA – Public Relations Assessment Requirements

### Diploma in Public Relations

August 2012

#### 1 Introduction

- 1.1 The Public Relations Assessment Requirements are designed to provide awarding organisations with a robust and flexible approach to deliver assessment for the Level 4 Diploma in Public Relations (QCF).

#### 2 External quality control

- 2.1 Awarding organisations will provide quality assurance that supports the delivery to all Level 4 Diploma in Public Relations (QCF) assessment centres, in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations will regularly carry out standard risk assessments in each Level 4 Diploma in Public Relations (QCF) qualification assessment centre and manage all identified risks appropriately.
- 2.3 Awarding organisations will consistently apply external verification processes at all Level 4 Diploma in Public Relations (QCF) assessment centres, underpinned by standard risk assessment and risk management processes.
- 2.4 Awarding organisations will supply Skills CFA with quarterly reports on:
- Registration and achievement for the Level 4 Diploma in Public Relations (QCF), at unit level where available

#### 3 Assessing performance

- 3.1 The Level 4 Diploma in Public Relations (QCF) includes both competence and knowledge units, as identified in Annex 1. Assessment of all competence units of the Level 4 Diploma in Public Relations (QCF) qualification must be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).
- 3.2 Assessment of knowledge units of the Level 4 Diploma in Public Relations (QCF) may be assessed however the awarding organisation sees fit, but must be in-line with regulatory requirements in England, Scotland, Wales and Northern Ireland. Assessment of the knowledge units must be evidenced separately from the competence units.

- 3.3 Evidence of achievement of knowledge learning outcomes and assessment criteria must not be inferred whilst assessing competence.
- 3.4 Competence units which have been imported into the Level 4 Diploma in Public Relations (QCF) will be assessed in compliance with the imported assessment strategies, where they exist. Where no alternative assessment requirements or assessment strategies exist, units should be assessed in adherence to the requirements set out in this assessment requirements document.

#### **4 Simulation of competence units**

- 4.1 Simulation must not be used, except in exceptional circumstances where natural work evidence is unlikely to occur. Agreement must be gained from the awarding organisation for the use of any simulated evidence. If simulation is used, it should be used sparingly and should only form a small part of the evidence for the qualification.

#### **5 Occupational expertise to assess performance, and moderate and verify assessments**

- 5.1 Assessment and Verification must be carried out in line with relevant National Occupational Standards, as follows:
- a. **Assessors** must carry out assessment to the National Occupational Standards for Learning and Development (March 2010) Standard 9.
  - b. **Internal verifiers or moderators** must carry out internal quality assurance to the National Occupational Standards for Learning and Development (March 2010) Standard 11.
  - c. **External verifiers or moderators** must carry out external quality assurance to the National Occupational Standards for Learning and Development (March 2010) Standard 12.
- 5.2 Assessors, internal moderators or verifiers that are working towards achievement of the appropriate qualifications for assessment and internal quality assurance must have their assessment decisions counter-signed by occupationally competent and suitably qualified assessors, internal moderators or verifiers, respectively.
- 5.3 Candidates work achievements must be assessed, moderated or verified at work by:
- a. **Assessors, moderators or verifiers** who have achieved, or are working towards achievement of, the appropriate regulatory body approved qualifications for assessment, moderation or verification;  
**OR**
  - b. A **trainer, supervisor or manager**, elected by an employer, who must either:
    1. Have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

**OR**

2. Seek guidance and approval from an awarding organisation to demonstrate that the:
  - Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
  - Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the assessment, moderation or verification qualifications are based.

- 5.4 **Assessors (including trainers, managers and supervisors, where they are involved in assessment)** must be occupationally competent to make Public Relations assessment judgements about the level and scope of individual candidate performance at work; and occupationally competent to make assessment judgements about the quality of assessment and the assessment process.
- 5.5 **External Moderators/Verifiers or Internal Moderators/Verifiers (including trainers, managers and supervisors, where they are involved in moderation or verification)** must be occupationally competent to make Public Relations moderation and verification judgements about the quality of assessment and the assessment process.
- 5.6 Awarding organisations will supply information on the requirements for internal and external moderation/verification activities to Level 4 Diploma in Public Relations (QCF) assessment centres.
- 5.7 Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Public Relations competence to deliver these functions. Skills CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Level 4 Diploma in Public Relations (QCF) assessment centres.

**Annex 1:**

<b>Group A - Mandatory Units</b>		<b>Credit</b>	<b>Level</b>	<b>GLH</b>	<b>Knowledge/ Competence</b>	<b>Unit Owner</b>
Unit 1	D/601/7644 Principles of Personal Responsibilities and how to Develop and Evaluate Own Performance at Work	4	3	32	K	CFA
Unit 2	M/504/0884 Understanding Public Relations	4	4	20	K	Pearson Education
Unit 3	T/504/0918 Understanding the Use of the Written Word for Public Relations	4	4	30	K	Pearson Education
Unit 4	A/504/0919 Understanding the Creative Process to Generate Ideas	3	4	22	K	Pearson Education
Unit 5	T/504/0921 Understanding the Media Landscape	6	4	42	K	Pearson Education
Unit 6	A/504/0922 Understanding Public Relations Campaign Planning	5	4	32	K	Pearson Education
Unit 7	L/504/0925 Communicating Effectively in Public Relations	5	4	25	C	Pearson Education
Unit 8	R/504/0926 Pitching Public Relations Stories to the Media	4	4	22	C	Pearson Education
Unit 9	Y/504/0927 Delivering and Evaluating Public Relations Campaigns	6	4	38	C	Pearson Education
Unit 10	D/504/0928 Delivering Professional Presentations	3	3	22	C	Pearson Education

<b>Group A - Mandatory Units</b>		<b>Credit</b>	<b>Level</b>	<b>GLH</b>	<b>Knowledge/ Competence</b>	<b>Unit Owner</b>
Unit 11	D/601/2654	2	3	7	C	CFA
Unit 12	H/504/0929	6	4	35	C	Pearson Education
Unit 13	K/600/9661	4	4	20	C	MSC
Unit 14	R/503/2891	2	3	15	K	Pearson Education

<b>Group B – Optional Units</b>		<b>Credit</b>	<b>Level</b>	<b>GLH</b>	<b>Knowledge/ Competence</b>	<b>Unit Owner</b>
Unit 15	Y/504/0930	5	4	40	K	Pearson Education
Unit 16	D/504/0931	4	5	24	K	Pearson Education
Unit 17	H/504/0932	3	4	20	K	Pearson Education
Unit 18	K/504/0933	4	4	25	K	Pearson Education
Unit 19	M/504/0934	4	4	32	K	Pearson Education
Unit 20	T/504/0935	2	3	10	K	Pearson Education
Unit 21	R/601/2540	4	3	28	C	CFA
Unit 22	Y/601/2541	4	3	30	C	CFA
Unit 23	D/601/2542	5	3	25	C	CFA
Unit 24	H/502/5783	1	3	10	K	Pearson Education
Unit 25	J/601/2552	4	3	25	C	CFA
Unit 26	T/601/2580	5	4	29	C	CFA

<b>Group B – Optional Units</b>			<b>Credit</b>	<b>Level</b>	<b>GLH</b>	<b>Knowledge/ Competence</b>	<b>Unit Owner</b>
Unit 27	A/502/4428	Negotiation and Influencing	6	4	30	C	ICM
Unit 28	R/600/9587	Develop, Maintain and Review Personal Networks	4	4	25	C	MSC



# Annexe F

## Management Standards Centre (MSC) – Assessment Strategy for Management and Leadership

### National Vocational (QCF) units

The Management Standards Centre (MSC) is the Government-recognised standards setting body for management and leadership. This document sets out the overarching assessment strategy for National Vocational Qualifications QCF and related units and Scottish Vocational Qualifications (SVQs) in management and leadership based on the National Occupational Standards (NOS) for management and leadership.

#### 1 Achieving External Quality Control of Assessment

The following measures are proposed in terms of achieving external quality control of assessment:

- Application of risk management. The MSC will expect awarding bodies to apply risk management systems to the awarding of NVQs and SVQs in management and leadership and deploy resources accordingly to tackle identified risks.
- The existing Management and Leadership Qualifications Forum (M&LQF) will take on a more active role in relation to the ongoing assessment and quality assurance of NVQs and SVQs in management and leadership.
- The MSC encourages Standardisation activities/exercises across centres (Assessors and Internal Verifiers) and External Verifiers where appropriate.

#### 2 Assessment through Performance in the Workplace

The NVQs and SVQs in management and leadership are to be assessed using evidence from the workplace i.e. observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

#### 3 Assessment by Simulation

Simulation is not allowed.

#### 4 Requirements for Assessors and Verifiers

Assessors and Verifiers must demonstrate that they:

- have credible expertise in management and leadership relevant to the level(s)/units they are assessing or verifying.
- keep themselves up-to-date with developments in management and leadership practice;
- have a thorough understanding of the NOS for management and leadership at the unit(s)/level(s) they are assessing or verifying.

In addition Assessors and Verifiers must have:

- An accredited assessor and/or verifier qualification, or
- A related qualification in assessment and/or verification that has been mapped to the National Occupational Standards for assessment and/or verifications, or
- Evidence of undertaking an employer assessment programme that has been mapped to the National Occupational Standards for assessment and/or verifications. MSC will work with Awarding Bodies through the Awarding Body forum to ensure that there is effective development and management through the QCF process.



# Annexe G

## Council for Administration (CfA) – Assessment Strategy for Business and Administration

### 1 Introduction

- 1.1 The Business and Administration Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Business and Administration NVQs and competence-based qualifications.

### 2 External quality control

- 2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Business and Administration NVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations must use independent assessment for competence-based qualifications.
- 2.3 Awarding organisations will supply the Council for Administration (CfA) with reports:
- Quarterly: provide registration and achievement data at unit and qualification levels.

### 3 Assessing performance

- 3.1 Assessment of all units at any level of Business and Administration NVQs and competence-based qualifications may be based on either learner performance at work or through simulation, as necessary (see Section 4 below).

### 4 Simulation of NVQ/SVQ units

- 4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).
- 4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, 'provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed'.
- 4.3 Units which have been imported by the CfA in their Business and Administration NVQs and competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

## 5 Occupational expertise to assess performance, and moderate and verify assessments

5.1 Learners can be assessed, moderated or verified at work either by:

- a) **Assessors, moderators or verifiers** who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

- b) A **trainer, supervisor or manager**, employed by an organisation, who must either:

- 1 Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,
- 2 Seek guidance and approval from an awarding organisation to demonstrate that the:
  - o Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
  - o Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

5.2 **Assessors** must be occupationally competent to make Business and Administration assessment judgements about the level and scope of individual learner performance at work or in RWEs; and occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 **External Moderators/Verifiers or Internal Moderators/Verifiers** must be occupationally competent to make Business and Administration moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply full information on the requirements for internal and external moderation/verification activities to Business and Administration assessment centres.

5.5 The sector requires all assessors, moderators and verifiers to maintain current Business and Administration competence to deliver these functions. The CfA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Business and Administration assessment centres.

# Annexe H

## Glossary of accreditation terminology

The following information about this qualification can also be found on the Edexcel website – [www.edexcel.com](http://www.edexcel.com)

<b>Accreditation start/end date</b>	The first/last dates that Edexcel can register learners for a qualification.
<b>Certification end date</b>	The last date on which a certificate may be issued by Edexcel.
<b>Credit value</b>	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
<b>Guided Learning Hours (GLH)</b>	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
<b>Learning Aims Database</b>	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
<b>Learning Aim Reference</b>	Unique reference number given to the qualification by the funding authorities on accreditation.
<b>Level</b>	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
<b>Qualification Number (QN)</b>	Unique reference number given to the qualification by the regulatory authorities on accreditation.
<b>Register of Regulated Qualifications</b>	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.
<b>Section 96</b>	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.
<b>Title</b>	The accredited title of the qualification.



# Annexe I

## BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications on the QCF	BTEC qualification suites on the QCF
<b>BTEC Level 7 Advanced Professional Qualifications</b> BTEC Advanced Professional Award, Certificate and Diploma	<b>7</b>	<b>BTEC Level 7 Professional Qualifications</b> BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 6 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>6</b>	<b>BTEC Level 6 Professional Qualifications</b> BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 5 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>5</b>	<b>BTEC Level 5 Professional Qualifications</b> BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 5 Higher Nationals</b> BTEC Level 5 HND Diploma
<b>BTEC Level 4 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>4</b>	<b>BTEC Level 4 Professional Qualifications</b> BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 4 Higher Nationals</b> BTEC Level 4 HNC Diploma
<b>BTEC Level 3 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>3</b>	<b>BTEC Level 3 Specialist Qualifications</b> BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 3 Nationals</b> BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

<b>BTEC qualifications on the NQF</b>	<b>Level</b>	<b>BTEC Specialist and Professional Qualifications on the QCF</b>	<b>BTEC qualification suites on the QCF</b>
<b>BTEC Level 2 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>2</b>	<b>BTEC Level 2 Specialist Qualifications</b> BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 2 Firsts</b> BTEC Level 2 Certificate, Extended Certificate and Diploma
<b>BTEC Level 1 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>1</b>	<b>BTEC Level 1 Specialist Qualifications</b> BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 1 Qualifications</b> BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	<b>E</b>	<b>BTEC Entry Level Specialist Qualifications</b> BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	<b>BTEC Entry Level Qualifications (E3)</b> BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

**NQF** = National Qualifications Framework

**QCF** = Qualifications and Credit Framework

<b>QCF qualification sizes</b>	
<b>Award</b>	1-12 credits
<b>Certificate</b>	13-36 credits
<b>Diploma</b>	37+ credits

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**For more information on Edexcel and BTEC qualifications please  
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