

Pearson BTEC Level 3 Certificate in Principles of the Creative and Cultural Sector (QCF)

Specification

Pearson BTEC Specialist qualification

First teaching August 2014

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Contents

Purpose of this specification	1
1 Introducing BTEC Specialist qualifications	3
2 Qualification summary and key information	4
QCF qualification number and qualification title	5
Apprenticeships	6
Relationship with previous qualifications	6
Progression opportunities through Pearson qualifications	6
Industry support and recognition	6
Relationship with National Occupational Standards	6
3 Qualification structure	7
Pearson BTEC Level 3 Certificate in Principles of the Creative and Cultural Sector (QCF)	7
4 Assessment	10
5 Recognising prior learning and achievement	11
Recognition of Prior Learning	11
Credit transfer	11
6 Centre resource requirements	12
General resource requirements	12
7 Centre recognition and approval	13
Approvals agreement	13
8 Quality assurance of centres	14
9 Programme delivery	15
10 Access and recruitment	16
11 Access to qualifications for learners with disabilities or specific needs	17
12 Units	18
Unit title	18
Unit reference number	18
QCF level	18
Credit value	18
Guided learning hours	18

Unit aim	18
Essential resources	18
Learning outcomes	18
Assessment criteria	19
Unit amplification	19
Information for tutors	19
Unit 1: Understand the creative and cultural industry	20
Unit 2: Principles of personal responsibilities and how to develop and evaluate own performance at work	26
Unit 3: Keep up to date with developments in the arts	38
Unit 4: Principles of working with and supervising others in a business environment	44
Unit 5: Principles of project management	51
Unit 6: Principles of customer service delivery	59
Unit 7: Principles of budgets in a business environment	71
Unit 8: Understand the role of marketing and advertising in live events and promotion	83
Unit 9: Understand the production of promotional material for the music industry	88
Unit 10: Understand how artist agreements and contracts work	94
Unit 11: Understand record label identity and branding	100
Unit 12: Understanding the impact of emerging technology on the music industry	106
Unit 13: Principles of planning costumes for a production	109
Unit 14: Awareness of health and safety in the creative and cultural sector	114
Unit 15: Principles of technical and production developments in the live arts	118
13 Further information and useful publications	122
14 Professional development and training	123
Annexe A	124
Mapping with National Occupational Standards	124

Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

1 Introducing BTEC Specialist qualifications

What are BTEC Specialist qualifications?

BTEC Specialist qualifications are qualifications from Entry to Level 3 on the Qualifications and Credit Framework (QCF). They are work-related qualifications available in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Some BTEC Specialist qualifications are knowledge components in Apprenticeship Frameworks, i.e. Technical Certificates.

There are three sizes of BTEC Specialist 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 QCF has 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 every 10 hours of learning time
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes to the standard determined by the assessment criteria.

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 3 Certificate in Principles of Creative and Cultural Sector (QCF)
QCF Qualification Number (QN)	600/9669/X
Qualification framework	Qualifications and Credit Framework (QCF)
Accreditation start date	11/06/2013
Operational start date	01/08/2014
Approved age ranges	16-18 19+
Credit value	15
Assessment	Centre-devised assessment (internal assessment) and Pearson-devised assessment (onscreen testing)
Guided learning hours	119 – 153
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see <i>Section 10 Access and recruitment</i>)

QCF qualification number and qualification title

Centres will need to use the QCF Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a QCF unit reference number (URN).

The qualification title, unit titles and QN will appear on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in the *Edexcel Information Manual*, available on our website: www.edexcel.com

Qualification objective

The Pearson BTEC Level 3 Certificate in Principles of Creative and Cultural Sector (QCF) is for learners who work in, or want to work in the creative and cultural industry. Potential job roles for particular pathways are listed in the table below:

Pathway	Potential job roles
Community Arts	Community arts administrator
Cultural Venue Operations	Assistant archivist, assistant exhibition organiser, museum assistant, assistant museum/art gallery curator, front of house or visitor services staff.
Live Events	Music promotions assistant, events promotions assistant, events assistant, events/entertainment officer, production assistant.
Music Business	A&R (Artists & Repertoire), music publishing assistant, radio plugger, marketing/promotions assistant or assistant publicist.
Costume and Wardrobe	Assistant costume/wardrobe manager.
Technical Theatre	Senior electrician/deputy heads of electrics, board/console operator, lighting technician, maintenance supervisor/manager, senior sound technician, senior stage technician, head flyman.

The qualification gives learners the opportunity to:

- develop knowledge related to the creative and cultural industry, developments in the arts, personal responsibilities and supervising others at work, customer service, budgets, project management and marketing.
- achieve a nationally-recognised Level 3 qualification
- develop their own personal growth and engagement in learning.

Apprenticeships

Creative and Cultural Skills approve the Pearson BTEC Level 3 Certificate in Principles of Creative and Cultural Sector (QCF) as a knowledge component for the Advanced Apprenticeships in Community Arts, Cultural Venue Operations, Live Events and Promotions, Music Business, Costume and Wardrobe or Technical Theatre.

Relationship with previous qualifications

This qualification is a replacement for the EDI Level 3 Certificate in Principles of Creative and Cultural Sector (QCF).

Progression opportunities through Pearson qualifications

Learners who have achieved the Certificate can progress to job roles relating to their chosen pathways; they can also do further qualifications to build on their skills, such as a level 3 Diploma in Production Arts (Arts Management, Theatre Technology or Costume), or a Foundation Degree, HNC/D or an undergraduate programme in Performing Arts Production or Music Production.

Industry support and recognition

This qualification is supported by Creative and Cultural Skills, the SSC for the Creative and Cultural Sector.

Relationship with National Occupational Standards

This qualification relates to the National Occupational Standards in Community Arts Management, Cultural Venue Operations, Sound Recording and Music Technology, Live Events and Promotions, Technical Theatre and Live Performance (Sound and Lighting and Wardrobe). The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

3 Qualification structure

Pearson BTEC Level 3 Certificate in Principles of the Creative and Cultural Sector (QCF)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	15
Number of mandatory credits that must be achieved	8
Number of pathway credits that must be achieved (learners must achieve all the credits from the mandatory units in their chosen pathway).	7

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	D/503/0271	Understand the creative and cultural industry	3	4	23
2	D/601/7644	Principles of personal responsibilities and how to develop and evaluate own performance at work	3	4	32
Unit	Unit reference number	Community Arts Pathway – mandatory unit	Level	Credit	Guided learning hours
3	R/601/7771	Keep up to date with developments in the arts	3	6	48
Unit	Unit reference number	Community Arts Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16
6	L/600/0659	Principles of customer service delivery	3	6	50
Unit	Unit reference number	Cultural Venue Operations Pathway – mandatory unit	Level	Credit	Guided learning hours
6	L/600/0659	Principles of customer service delivery	3	6	50

Unit	Unit reference number	Cultural Venue Operations Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16
Unit	Unit reference number	Live Events Pathway – mandatory units	Level	Credit	Guided learning hours
7	F/601/7653	Principles of budgets in a business environment	3	2	16
8	K/601/6321	Understand the role of marketing and advertising in live events and promotion	3	2	16
Unit	Unit reference number	Live Events Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16
3	R/601/7771	Keep up to date with developments in the arts	3	6	48
Unit	Unit reference number	Music Business Pathway – mandatory units	Level	Credit	Guided learning hours
9	J/601/6679	Understand the production of promotional material for the music industry	3	3	18
10	A/601/6663	Understand how artist agreements and contracts work	3	3	18
11	J/601/6682	Understand record label identity and branding	3	3	18
12	J/505/1308	Understanding the impact of emerging technology on the music industry	3	2	12
Unit	Unit reference number	Music Business Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16

Unit	Unit reference number	Costume and Wardrobe Pathway – mandatory unit	Level	Credit	Guided learning hours
13	Y/503/0270	Principles of planning costumes for a production	3	4	21
Unit	Unit reference number	Costume and Wardrobe Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16
14	J/601/6715	Awareness of health and safety in the creative and cultural sector	2	2	14
3	R/601/7771	Keep up to date with developments in the arts	3	6	48
15	A/503/0259	Principles of technical and production developments in the live arts	2	3	18
Unit	Unit reference number	Technical Theatre Pathway – mandatory unit	Level	Credit	Guided learning hours
15	A/503/0259	Principles of technical and production developments in the live arts	2	3	18
Unit	Unit reference number	Technical Theatre Pathway – optional units	Level	Credit	Guided learning hours
4	H/601/7645	Principles of working with and supervising others in a business environment	3	3	24
5	A/601/7652	Principles of project management	3	2	16
14	J/601/6715	Awareness of health and safety in the creative and cultural sector	2	2	14

Please note that unit **R/601/7771** *Keep up to date with developments in the arts*, is barred against unit **A/503/0259** *Principles of technical and production developments in the live arts*: learners may only choose one of these units.

4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment methods
Units 1, 3, 8, 9, 10, 11, 12, 13, 14 and 15	Centre-devised assessment
Units 2, 4, 5, 6 and 7	Pearson-devised assessment: onscreen test

Centre-devised assessment (internal assessment). Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly, which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example, performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and maximise the use of practical activities in delivery and assessment.

To avoid over-assessment centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. See *Section 13. Further information and useful publications*.

Pearson-devised assessment (external assessment). To pass an externally assessed unit, learners must pass an onscreen test. Pearson sets and marks the test. The test writer will use the *Unit amplification* section as a guide when writing questions for the external assessments.

Further information, including details of test duration and question types is available on the webpage for this qualification,
<http://pearsonwbl.edexcel.com/iwantto/Pages/onscreen-testing-btec-qcf.aspx>

5 Recognising prior learning and achievement

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.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, 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. If 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.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website at: www.edexcel.com/policies

Credit transfer

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. All awarding organisations recognise the credits awarded by all other awarding organisations that operate within the QCF.

If learners achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of credit achievement.

6 Centre resource requirements

As part of the approval process, centres must make sure that the resources requirements below are in place before offering the qualification.

General resource requirements

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details of the Equality Act 2010, please go to www.legislation.gov.uk

7 Centre recognition and approval

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson BTEC qualifications is available at www.edexcel.com.

Approvals agreement

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

8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses Pearson BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC apprenticeship ('single click' registration):
 - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions
- 2 Delivery of the qualification outside the apprenticeship:
 - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate annually a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details please see the *UK Vocational Quality Assurance Handbook* on our website.

9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Where a unit is externally assessed, it is essential that learners have covered all of the *Unit amplification* before they are tested.

Centres must make sure that any legislation taught is up to date.

10 Access and recruitment

Pearson's policy regarding access to our 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 those wishing to access the qualifications.

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

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Further details on how to make adjustments for learners with protected characteristics are given in the *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

These documents are available on our website, at www.edexcel.com/policies

12 Units

Units have the following sections.

Unit title

The unit title is on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

QCF level

All units and qualifications within the QCF have a level assigned to them. There are nine levels of achievement, from Entry to Level 8. The QCF Level Descriptors inform the allocation of the level.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided learning hours are the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim for a programme. This definition covers lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes assessment by staff where learners are present. It does not include time spent by staff marking assignments or homework where the learner is not present.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Indicative resource materials* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Understand the creative and cultural industry

Unit reference number: D/503/0271

QCF level: 3

Credit value: 4

Guided learning hours: 23

Unit aim

This unit aims to develop learners' knowledge and understanding of the creative and cultural industry, including factors affecting those working in the industry, issues and constraints associated with the development of the industry and the role of enterprise and entrepreneurship within the industry.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the cultural, economic, political and social factors associated with working in the creative and cultural industry.	1.1 Explain the cultural factors associated with working in the creative and cultural industry.	<ul style="list-style-type: none"> □ Cultural factors: language, religion, traditions, laws
		1.2 Explain the economic factors associated with working in the creative and cultural industry.	<ul style="list-style-type: none"> □ Economic factors: recession, reduction in public budgets, attracting investment, employment and wealth generation effects, contributions to innovation and international trade and investment, local economic plans
		1.3 Explain the political factors associated with working in the creative and cultural industry.	<ul style="list-style-type: none"> □ Political factors: national and local funding issues (direct and indirect factors), national and local political issues (government cut backs, employment issues, training costs and funding, local authority policies, local and regional development)t
		1.4 Explain the social factors associated with working in the creative and cultural industry.	<ul style="list-style-type: none"> □ Social factors: religion, ethnicity, economics, education, locality

Learning outcomes	Assessment criteria	Unit amplification
<p>2 Understand the issues relating to diversity and equality in the creative and cultural industry.</p>	<p>2.1 Explain the impact of diversity and equal opportunities issues on the creative and cultural industry.</p>	<ul style="list-style-type: none"> □ Diversity: issues relating to race, ethnicity, faith, disability, age, gender, sexuality, class, economic disadvantage and any social and institutional barriers and inequalities □ Equal Opportunities: Equality Act; removal of barriers to entry, under representation and closed networks □ Impact: positive discrimination, opportunities for all, cultural diversity, collaboration, innovation
	<p>2.2 Evaluate the effectiveness of legislation in resolving diversity and equal opportunities issues.</p>	<ul style="list-style-type: none"> □ Diversity and equal Opportunities issues: age, race, disability, gender, maternity/paternity leave, employee rights and responsibilities □ Effectiveness of legislation: Equality Act (unlawful to discriminate in the workplace on the grounds of sex, age, religion, marriage, maternity race, colour, nationality, ethnicity or national origins, disability); gives women (and men) a right to equal pay for equal work)
	<p>2.3 Describe diversity and equality issues in the creative and cultural industry.</p>	<ul style="list-style-type: none"> □ Diversity: issues relating to race, ethnicity, faith, disability, age, gender, sexuality, class, economic disadvantage and any social and institutional barriers and inequalities □ Equal Opportunities: Equality Act; removal of barriers to entry, under representation and closed networks □ Visitors: age, social factors, economics, disability issues

Learning outcomes		Assessment criteria	Unit amplification
3	Know the legal, ethical and environmental issues and constraints affecting the creative and cultural industry.	3.1 Explain legal issues and constraints affecting the creative and cultural industry.	<ul style="list-style-type: none"> □ Legal issues: copyright, licensing, design laws, trademarks, patents
		3.2 Explain ethical issues and constraints affecting the creative and cultural industry.	<ul style="list-style-type: none"> □ Ethical issues: ethnicity, disability, children, vulnerable adults □ Constraints: material, time, space, location, social, economic, ethical, legal
		3.3 Explain environmental issues and constraints affecting the creative and cultural industry.	<ul style="list-style-type: none"> □ Environmental issues: conservation, gardens and estates, energy issues, environmental health, pollution (light and sound), waste disposal □ Constraints: material, time, space, location, social, economic, ethical, legal
4	Understand how enterprise and entrepreneurship relate to the creative and cultural industry.	4.1 Explain the different forms of enterprise and entrepreneurship within the creative and cultural industry.	<ul style="list-style-type: none"> □ Enterprise and entrepreneurship: sponsorship, (events and exhibitions); exhibition contents, (commercial topics); commercial products, (sales related to events and exhibitions); commercial productions, (film hire, wedding venue); fundraising (national and local); value for money visits
		4.2 Explain the role of enterprise and entrepreneurship in contributing to the creative and cultural industry.	<ul style="list-style-type: none"> □ Roles: economic support, attracting wider audiences, commercial awareness in increasing income from various sources, wider funding awareness

Information for tutors

Delivery

This unit is structured to enable the learner to have a sound understanding of the creative and culture industry.

The learner will normally have a good knowledge of the sector they are working in, but will need to expand this knowledge and understanding to all other sectors of this industry.

A well-qualified and suitably experienced tutor should deliver this unit.

Learning outcome 1: Understand the cultural, economic, political and social factors associated with working in the Creative and Cultural industry.

This could be delivered through a tutor presentation or by learners working in groups to classify the different sectors and business types. Learners could use the internet to source and clarify information on cultural, economic, political and social aspects associated with the creative and cultural sector. Classroom discussion is essential to cover the wide range of information that is required. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Learners could use industry websites to locate information on the political and economic factors. Visiting speakers who work in the creative and cultural industry would be a useful resource in aiding learners to meet this learning outcome.

Learning outcome 2: Understand the issues relating to diversity and equality in the Creative and Cultural industry.

Equality and diversity issues can be explored through looking at statistical data and industry case studies. Detailed information will be needed on the legislation involved with this subject; these provide a basis for classroom discussion.

Learning Outcome 3: Know the legal, ethical and environmental issues and constraints affecting the Creative and Cultural industry.

Learners working in groups can clarify the very detailed legal issues, which include copyright, licensing, trademarks etc. Learners could also use the internet to source this information. Visiting speakers who work in this speciality area of the creative and cultural industry would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 4: Understand how enterprise and entrepreneurship relate to the Creative and Cultural industry

Visiting speakers who work in this speciality area of the creative and cultural industry would be a useful resource in aiding learners to meet this learning outcome. The internet will provide learners with information to form the basis of group discussion in the classroom.

Learners should be encouraged to carry out research, and engage with other sectors by visiting venues and possibly working in different sectors and engaging with employers and employees.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: a presentation covering all the Learning Outcomes. A presentation may be delivered by a small group of learners, but assessors must confirm that all the learners have fully participated in the presentation and have all the supporting evidence. A report covering all the learning outcomes may be used as evidence. The suggested methods of assessments may be adapted to meet local needs or the needs of particular groups of learners. Assessors should ensure that learners demonstrate a clear understanding of all the learning outcomes.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.
www.designcouncil.org.uk	The Design Council: free guides, case studies, films and lists of networks and organisations.
www.museumsassociation.org/home	Museum Association: a membership organisation providing information on museums, galleries and heritage.

Unit 2: Principles of personal responsibilities and how to develop and evaluate own performance at work

Unit reference number: D/601/7644

QCF level: 3

Credit value: 4

Guided learning hours: 32

Unit aim

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

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the employment rights and responsibilities of the employee and employer and their purpose	1.1 Identify the main points of contracts of employment and their purpose	<ul style="list-style-type: none"> Contract of employment: main points (pay, working hours, holidays, sickness, notice period, pension scheme); purpose (an agreement between an employer and an employee which sets out their employment rights, responsibilities and duties, shows acceptance of the job on the terms offered by the employer; to cut out any disputes with the employer at a later date, to help understand employment rights, both employer and employee are bound to the employment contract until it ends or until the terms are changed)
		1.2 Outline the main points of legislation affecting employers and employees and their purpose, including anti-discrimination and entitlement legislation	<ul style="list-style-type: none"> Equality and Diversity affecting employers and employees: Equality Act 2010 (legally protects people from discrimination in the workplace and in society); replaces previous anti-discrimination laws with a single act, making the law easier to understand and strengthening protection in some areas; unlawful to discriminate on the grounds of sex, age, religion, marriage, maternity race, colour, nationality, ethnicity or national origins, disability (where employers employ 15 or more staff); unlawful to discriminate against current or prospective workers or customers who have a disability or who have had a disability in the past; employer has a duty to make reasonable adjustments to either the workplace, workstation or working environment to help the disabled person cope with their disability; direct discrimination where a person is treated less favourably than another in relation to recruitment, selection, training, promotion, selection for redundancy (because of their race, colour, nationality, ethnic origin or disability); gives women (and men) a right to equal pay for equal work; indirect discrimination (where a person

Learning outcomes	Assessment criteria	Unit amplification
		<p>of a certain race, colour, nationality, ethnic origin, age or disability cannot comply with an unjustifiable requirement imposed by an employer, which in practice can be met by a smaller proportion of that group); where a person is discriminated against because they are perceived to have, or are associated with someone who has a protected characteristic as outlined above; Equality Act provisions which came into force in April 2011 (the application of voluntary positive action in recruitment and promotion processes when faced with two or more candidates of equal merit, to address under-representation in the workforce); neither quotas nor positive discrimination is allowed; positive action is an exception to the general rule that discrimination, whereby one employee is treated less favourably than another based on a 'protected characteristic', is prohibited; unlawful to discriminate against employees, job seekers and trainees because of their age (includes direct and indirect discrimination, harassment and victimisation); removed the upper age limits on unfair dismissal and redundancy; regulations apply to all workers (including office holders, police, barristers and partners in a business); October 2012 provisions ban age discrimination against adults providing services and public functions, unless an exception from the ban or good reason can be shown for the differential treatment; ensures new law prohibits only harmful treatment resulting in genuinely unfair age discrimination; does not outlaw instances of different treatment that are justifiable or beneficial</p>

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ Employment legislation affecting employers and employees: Employment Rights Act 1996 including allowing employee time off for annual leave, paternity/maternity leave, absences, sickness and statutory sickness pay, trade union or staff association representation; working hours; flexible working; minimum wage; redundancy; unfair dismissal; grievance procedure; exemptions (some exemptions exist for very specific situations); terms and conditions of employment (written statement key terms and conditions within two months of employee starting work, providing the contract is to last for more than one month); Employment Act 2008 (the introduction of stricter penalties for breaches of the national minimum wage laws, an extended right for parents to request flexible working, a new ACAS Code on Grievance and Discipline, repealed the Employment Act 2002); subsequent amendments to employment legislation.
1.3	Identify where to find information on employment rights and responsibilities both internally and externally	<ul style="list-style-type: none"> □ Internal sources of information and support: staff manual/hand book, trade unions, staff associations; sources of help (line manager, organisation's human resources staff, organisation's grievance procedures); main representative bodies (trade unions, staff associations) □ External sources of information and support: Advisory Conciliation and Arbitration Service (ACAS), Business Link, The Work Foundation, Department for Business, Innovation and Skills (BIS); sources of employment rights information (government websites, ACAS website, Citizens Advice Bureau)

Learning outcomes	Assessment criteria	Unit amplification
1.4	Explain the purpose and functions of representative bodies that support employees	<ul style="list-style-type: none"> □ Role of employees' representative bodies: to negotiate terms of employment; to protect interests of employees; to provide legal assistance and advice to employees; purpose (to receive and give information to management, to pass on information within the workforce, to be available for consultation by management over certain workplace matters); importance (to create an atmosphere of mutual trust between employees and management, improve workplace relations)
1.5	Explain employer and employee responsibilities for equality and diversity in a business environment	<ul style="list-style-type: none"> □ Employer responsibilities for equality and diversity: policies and procedures; The Equality and Human Rights Commission (EHRC) (promotes equality and to tackle and eliminate discrimination in relation to gender, gender reassignment, religion, belief, disability, sexual orientation, age or race, and to promote human rights) □ Employee responsibilities for equality and diversity: liability for causing offence; sensitivity to people's individual needs (observation, listening, checking particular requirements in advance – diet, mobility); respect for others' abilities, background, values, customs and beliefs (open mindedness, learning about different cultures, avoiding assumptions over customs and beliefs, building working relationships through focusing on shared objectives)
1.6	Explain the benefits of making sure equality and diversity procedures are followed in a business environment	<ul style="list-style-type: none"> □ Benefits of equality and diversity procedures: benefits to employees (improved staff morale, staff know they are being treated fairly); benefits to organisation (range of perspectives, values and skills, valuable in teams to ensure decisions are viewed from a range of perspectives, to be representative of community, to create ideas, recruiting by ability/talent leading to increased profit, productivity, proficiency)

Learning outcomes	Assessment criteria	Unit amplification
<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>	<ul style="list-style-type: none"> □ Employer responsibilities for health, safety and security at work: primary responsibility to reduce risks in the workplace; legal responsibility to look after health and safety; Health and Safety at Work Act 1974 (requires employers to carry out risk assessments, provide protective equipment if needed and ensure emergency procedures are in place); ensure employees are trained in health, safety and security procedures; ensure plant and machinery are safe and that safe systems of work are set and followed; ensure articles and substances are moved, stored and used safely; provide adequate welfare facilities; produce health and safety policies and procedures; appoint appropriate health, safety and security personnel (health and safety representative who will represent employees' interests, report to employer regarding hazards, dangerous occurrences, general matters affecting groups of employees; fire warden, first aiders); health and safety committee □ Employee responsibilities for health, safety and security at work: employee's legal responsibility (to take care of own health and safety, to take care of health and safety of others who may be affected by own actions, to cooperate with others on health and safety, not to interfere with, or misuse, anything provided for own or others' health, safety or welfare); correctly use work items provided by the employer, including personal protective equipment, in accordance with training and instructions; health and safety in office environment (induction, use of equipment, display screen assessments, eye testing, filing cabinets, lifting, storage on shelves or on top of furniture, hazardous substances); reporting accidents and hazards, limits of personal responsibility; following instructions; cooperating with employer's measures

Learning outcomes	Assessment criteria	Unit amplification
	<p>2.2 Explain the purpose of following health, safety and security procedures in a business environment</p>	<ul style="list-style-type: none"> <li data-bbox="288 192 767 1178">□ Purpose of following health and safety procedures: to protect the health, safety and welfare of employees and customers; scope and responsibilities of own job role in dealing with health and safety; personal conduct; identifying health and safety hazards (faulty wiring, trailing flexes, torn carpet, broken glass, dangerous chemicals, visual display unit (VDU) screens, faulty equipment, poor posture when using computer, wet floors); reporting of accidents (RIDDOR); control of substances hazardous to health (COSHH) (sets out eight basic measures for employers and employees); regulations for using computers; keeping equipment clean and hygienic; following manufacturer's instructions; leaving equipment, resources and work area ready for the next user; positioning for copy typing; implications of non-compliance (exposing the organisation to fines or prosecution, exposing customers and colleagues to accidents) <li data-bbox="791 192 1126 1178">□ Purpose of following security procedures: types of confidential information (customer or employee records); breach of confidentiality (overheard conversations); Data Protection Act 1998 (eight principles to protect the privacy of individual people, rules as to the personal data that can be collected, what use may be made of this information); Freedom of Information Act 2000 (gives individuals rights to access information held by public authorities, such as local authorities, central government, the NHS, schools and police); data protection infringement; intruders; not establishing caller's identity; mislaid files; easy access to computers

Learning outcomes		Assessment criteria	Unit amplification
3	Understand how to manage own work	3.1 Explain the reasons for planning and prioritising own work	<ul style="list-style-type: none"> Reasons for planning and prioritising own work: reasons for planning (efficiency of time, meeting deadlines, meeting organisational objectives); negotiating realistic targets and setting timescales; flexibility; resources; own responsibilities; dealing with problems (interruptions, inability to meet deadlines, procrastination)
		3.2 Identify ways of planning and prioritising own work	<ul style="list-style-type: none"> Planning own work: methods (task list, action plans, work schedule, diary systems, prioritising, monitoring work, checking against deadlines, checking for accuracy and quantity); importance of quality measures (to be agreed amongst colleagues to create consistent standards across team, to motivate team members); examining other commitments shown on task list, work schedules; allowing for contingencies; need to follow regulations
		3.3 Explain the purpose of keeping other people informed about progress	<ul style="list-style-type: none"> Purpose of keeping others informed of progress: using techniques and tools (diaries, planners, 'to do lists', catch up meetings, emails); how to plan and allocate time; meeting deadlines; ways of informing others of progress; revising plans; when to use different ways of informing others
		3.4 Describe methods of dealing with pressure in a business environment	<ul style="list-style-type: none"> Dealing with pressure: importance of qualities of resilience; the importance of being assertive and when (negotiating targets, priorities and timescales) taking on new challenges; adapting to change; coping with pressure

Learning outcomes	Assessment criteria	Unit amplification
4	<p>4.1 Understand how to evaluate and improve own performance in a business environment</p> <p>4.2 Explain the purpose of continuously evaluating and improving own performance in a business environment</p> <p>4.3 Describe ways of evaluating and improving own performance in a business environment</p> <p>4.4 Explain the purpose of encouraging and accepting feedback from others</p>	<ul style="list-style-type: none"> □ Improving own performance at work: importance (to develop own skills, to gain personal satisfaction, to enhance organisation's competitive position) □ Ways of improving own performance: carrying out a skills audit; skills (interpersonal, listening, dealing with stress, time management, IT, leadership); evaluating strengths, weaknesses; career development; threats to progress; objectives; learning activities (on the job – work shadowing, coaching, mentoring, job rotation; off the job – college, distance learning, eLearning); independent learning; learning styles; importance of developing learning plans (to set objectives to meet personal and professional goals, identify resources and support needed, set review dates, monitor plan to assess progress against targets); finding advice and information on career development inside the organisation (human resources departments, training courses); outside the organisation (libraries, community centres, newspapers, the internet); continually monitoring and improving work; setting high standards; taking on new challenges; learning from others □ Feedback: purpose (to reinforce positive behaviours, to learn, to continuously improve own work, to evaluate work activities, to understand own impact on others); methods of feedback (formal, informal, appraisal, review, personal development planning); legal issues (discrimination on grounds of sex, race, disability, sexual orientation and religion) □ Receiving feedback: collecting feedback; purpose (meeting own goals and objectives); importance of feedback from others; reflecting on feedback from managers or colleagues to meet job competencies; sources of feedback (360o appraisal from different people in workplace, performance reviews, informal communication with others in workplace)

Learning outcomes	Assessment criteria		Unit amplification
	4.4	Explain different types of career pathways and roles available	<ul style="list-style-type: none"> □ Career pathways: typical career pathways for administrators (team administration, departmental administrator, administration manager, secretary, personal assistant); specialisms (customer service, accounting, marketing, human resource management, purchasing, information technology support)
5 Understand the types of problems that may occur with own work and how to deal with them	5.1	Describe the types of problems that may occur with own work	<ul style="list-style-type: none"> □ Problems: types of problems (unclear team aims, poor communication, unmet expectations, perceptions of responsibilities/work not being shared equally, disagreements, conflicts of interest, work errors, unable to meet deadlines, loss of motivation)
	5.2	Explain ways of dealing with problems that may occur with own work	<ul style="list-style-type: none"> □ Dealing with problems: defining boundaries and roles; asking for clarification; using time management techniques; problem solving skills (defining problem, generating alternatives, decision making, evaluating the decision); having a contingency plan; techniques for dealing with problems (clear communication, listening skills, joint problem solving, consult all team members, negotiation)
	5.3	Explain how and when to refer problems to relevant colleagues	<ul style="list-style-type: none"> □ Referring problems: reporting to relevant colleagues (line manager or person delegated to provide guidance and support, technical support facility); following organisation's policies and procedures; when to refer problems (if outside own authority, when unsure)

Learning outcomes	Assessment criteria		Unit amplification
6	6.1	Explain key stages in the decision-making process	<ul style="list-style-type: none"> □ Stages in the decision making process: identify the problem (a discrepancy between the existing state and the desired state); information search (to gather as much information as possible); develop alternatives (using creative techniques, brainstorming); evaluate alternatives (to select the best option, identify the strengths and weaknesses of each alternative); implement the best alternative (putting the chosen alternative into action); follow-up (to judge whether the decision was correct, checking whether the problem has been resolved)
	6.2	Explain the purpose of not exceeding own limits of authority in making decisions	<ul style="list-style-type: none"> □ Not exceeding limits of authority: importance (non-compliance with organisational procedures may have serious implications for the organisation)

Information for tutors

Delivery

This unit should be delivered in a way that develops learners' knowledge and understanding of the rights and responsibilities of employees and employers. In addition, delivery should support learners in managing and evaluating their own work effectively, including how to resolve problems effectively and when to refer problems to relevant colleagues.

Learners should be encouraged to engage with employers, and, where possible, with other employees, to gain knowledge and understanding from their experiences, rather than through a purely theoretical context. Engagement can be made through visits, the use of guest speakers and, where possible, time spent with employers.

This unit could be delivered through distance learning, however this will involve additional, and different, considerations, such as planning, and other measures, to ensure learners can gain the required knowledge and understanding.

Assessment

This unit is assessed through an onscreen test. Pearson will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resources

Books

Armstrong M – *Armstrong's Handbook of Human Resource Management Practice* (Kogan Page, 2009) ISBN 9780749452421

Ashley V and Ashley S – *Business and Administration Student Handbook Level 3* (Cfa 2007) ISBN 978-0-9550920-5-3

Bevan J, Dransfield R, Goymer J, Richards C – *BTEC Level 3 National Business Student Book: B1 (Level 3 BTEC National Business)* (Edexcel 2010) ISBN 978-1846906343

Carysforth C, Chadwick A and Rawlinson M – *NVQ Level 3 Business and Administration Student Handbook, Third Edition* (Heinemann, 2006) ISBN 978-0435463342

Journals

People Management (Chartered Institute of Personnel and Development)

Websites

www.acas.org.uk	The government funded agency which provides advice on industrial relations and employment issues
www.cfa.uk.com	Council for Administration
www.cipd.co.uk	Chartered Institute of Personnel and Development
www.hse.gov.uk	The Government's Health and Safety Executive, providing information on health and safety rights and responsibilities

Unit 3: Keep up to date with developments in the arts

Unit reference number: R/601/7771

QCF level: 3

Credit value: 6

Guided learning hours: 48

Unit aim

This unit is about understanding how to keep up to date with developments both within your organisation and within your sector and develop networks and personal contacts to help provide you with a wide range of information, support and resources.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to carry out research to keep up to date with developments in the arts	1.1	Explain the importance of keeping up to date with development in the arts	<ul style="list-style-type: none"> □ Arts developments: developing trends, economic situation (national and local issues), emerging technology, customer requirements
		1.2	Describe the types of information that need to be researched	<ul style="list-style-type: none"> □ Information: emerging technology, political situation (national and local), economic and funding issues (to include national and local funding, commercial opportunities), audience needs and expectations
		1.3	Critically compare different information sources that may be used to obtain information	<ul style="list-style-type: none"> □ Information sources: websites, trade magazines and press, reports, market research (sector skills councils research), case studies
		1.4	Explain how to select the most appropriate and reliable information sources and research methods	<ul style="list-style-type: none"> □ Reliable sources: National and government sources (reports, market research, case studies), industry recognised reliable sources (websites, trade and press publications) □ Research methods: primary (surveys, interviews), secondary (statistics, reports) □ How to select appropriate information and research methods: consider type of information required; qualitative, quantitative

Learning outcomes		Assessment criteria	Unit amplification
2	Understand how to present clear and accurate information	2.1 Explain who will need to see the outcomes of research	<ul style="list-style-type: none"> □ Research receivership: management of organisations including heads of departments, shareholders, trustees, other stakeholders
		2.2 Explain why it is important to systematically analyse information	<ul style="list-style-type: none"> □ Information requirements: condense information, provide clear information, present accurate facts
		2.3 Describe different methods that can be used to collate and analyse both quantitative and qualitative information	<ul style="list-style-type: none"> □ Quantitative information: numerical, measurable, statistics □ Qualitative information: opinions, experiences □ Methods to collate quantitative information: field research, surveys, published statistical reports, internet □ Methods to collate qualitative information: interviews, case studies, focus groups, observation □ Methods to analyse: process, categorise, modelling, specialist software
		2.4 Describe different formats for reporting information	<ul style="list-style-type: none"> □ Report formats: presentations, power points, Excel reports, other technical reports
		2.5 Explain how to select the most appropriate format for reporting information	<ul style="list-style-type: none"> □ Appropriate formats: type of report that is being delivered (visual, numerical, confidentiality), who the report is for, management, employees, the general public), locality and venue, data protection

Learning outcomes		Assessment criteria	Unit amplification
3	Understand how to develop networks	3.1 Explain the importance of building networks	<ul style="list-style-type: none"> importance of building networks: referrals (other contacts in the sector), relationships (similar positions in other organisations), leads (business and commercial opportunities)
		3.2 Evaluate opportunities to build personal contacts and form networks that provide information, support and resources	<ul style="list-style-type: none"> Contacts: commercial and business income improvement (specific groups from the sectors in the creative industries), repeat business (customer/visitor databases), share best practice (similar organisations)
		3.3 Explain the importance of maintaining confidentiality	<ul style="list-style-type: none"> Confidentiality: data protection, customer loyalty, the law
		3.4 Evaluate the ways own organisation and networks with other organisations and how these could be improved	<ul style="list-style-type: none"> Networking ways: evaluate effectiveness (positive and negative items including time and cost issues), new and changing trends, introduce new contacts
4	Be able to keep up to date with developments in own organisation and sector	4.1 Summarise trends and opportunities that affect demand and impact on particular projects	<ul style="list-style-type: none"> Trends: changing trends in your own sector and all other sectors in the industry, political and economic), emerging technology (new advances in this subject), customer needs and expectations, new commercial issues and opportunities
		4.2 Develop and use networks and contacts to gather information and identify opportunities that add value to own organisation in line with organisational guidelines	<ul style="list-style-type: none"> Methods to develop networks: review and evaluate present networks, research new networks, attend network meetings, involve others in the organisation to widen the network
		4.3 Present outcomes of research to own organisation in an appropriate format	<ul style="list-style-type: none"> Presentation methods: power point presentations, excel spreadsheets, team meetings

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

This unit is structured to enable the learner to have a full understanding of the developments in the creative and culture industries.

The learner will normally have a good knowledge of the sector they are working in, but will need to expand this knowledge and understanding to all other sectors of this industry.

Learning Outcome 1: Understand how to carry out research to keep up to date with developments in the arts

This could be delivered through a tutor presentation or by learners working in groups to classify the different aspects of keeping up to date with the arts. Learners could use the internet to source information about the types of economic and technology issues associated with the creative and cultural sector. Classroom discussions could be used to describe how and where to research information that is required to complete this learning outcome. Information could be gleaned from industry magazines and the media to use as a basis for discussion.

Learning Outcome 2: Understand how to present clear and accurate information

This will further develop the skills achieved in learning outcome 1 in providing different types of information that can be researched and the various methods now used to research and report the information. Classroom discussions could be used to describe how and where to research factual information that is required to complete this learning outcome. The internet will provide additional information that is needed.

Learning Outcome 3: Understand how to develop networks

This could be delivered through a tutor presentation or by learners working in groups to classify the different aspects of creating, maintaining and working with networks. Learners could use the internet to source information about the type of networks in the creative and cultural sector. Classroom discussions could be used to develop the ideas. Visiting speakers who work in the creative and cultural industry would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 4: Be able to keep up to date with developments in own organisation and sector

This learning outcome carries on from the previous outcome and requests the learner to look at networks in their own sector of the industry. Learners working in groups to discuss their own findings can be a useful exercise to gain this evidence. The learner then has to present the findings in a variety of methods, and a presentation to the rest of their group creates good evidence for one of the assessment methods.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: Learners could carry out research, and then create and present reports to various levels of employees in their organisation. This material and the presentation will form the basis of the evidence required.

The learner will could also research and be involved in their organisation's networks. The learner should be encouraged to attend meetings, and then evaluate and suggest improvements to the present network facilities. The learner could then create reports and present to the appropriate personnel. The assessor can observe the presentations or obtain a witness s testimony

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.
www.museumsassociation.org/home	Museum Association: a membership organisation providing information on museums, galleries and heritage.

Unit 4: Principles of working with and supervising others in a business environment

Unit reference number: H/601/7645

QCF level: 3

Credit value: 3

Guided learning hours: 24

Unit aim

This unit is about the knowledge and understanding needed to work effectively with others in a business environment, including communication, working in and supervising a team, and providing customer service.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the purpose of working with others in a team	1.1 Describe how team working can help to achieve goals and objectives	<ul style="list-style-type: none"> □ Team: difference between a group and a team (a group is a collection of people with a common interest, a team is a group of individuals with a shared vision working together with specific roles and committed to achieving a common goal); characteristics of an effective team (be united in a common purpose, trust each other, be open with each other, accept consensus decisions, support each other, be dependent on each other, be committed, work conflict through) □ Team working: benefits of team (joint commitment, range of skills and expertise, sharing of ideas, collective ability to innovate, coordination of effort, motivation, better communication); supporting development of skills of members; importance of maximising benefits of team; importance of informing others and providing guidance; purpose of prioritising; stages of team development (forming, storming, norming, performing) □ Goals and objectives: difference between goals and objectives (goals relate to aspirations, purpose and vision, objectives are the plan towards achievement of the goal)
		1.2 Explain the purpose of sharing work goals and plans when working in a team	<ul style="list-style-type: none"> □ Purpose of sharing work goals and plans: setting SMART objectives (specific, measurable, achievable, realistic, time bound); importance of communicating purpose and objectives of team to all members (to ensure all members are clear about team goals and individual roles); using skills and attributes of individual team members; motivating team members to achieve goals and objectives; motivates team to work together

Learning outcomes	Assessment criteria	Unit amplification
2 Understand how to behave in a way that supports positive working with others	<p>2.1 Explain the purpose of agreeing and setting standards for own work and the work of a team</p> <p>2.2 Identify how to allocate work to a team so the best use is made of strengths and abilities</p>	<ul style="list-style-type: none"> □ Agreeing and setting standards for own work: agreeing realistic targets to meet objectives; specifying the resources required to achieve objectives and checking availability of resources; agreeing the working methods and the schedule for undertaking the work; importance of taking account of other work tasks allocated; clarifying instructions and work requirements; seeking support when required; sharing work goals and plans □ Agreeing and setting standards for the work of a team: agreeing realistic targets with team (objectives to be achieved, resources that are needed, the best working methods, a schedule for undertaking the work); considering what other work team has to do □ Allocate work in a team: delegating work (knowing what tasks to delegate, who should do it, briefing team member to ensure they know their responsibilities, monitoring progress); importance of delegating (to develop team spirit, spread the workload, motivate team members, develop new skills and competencies); build on strengths and overcome weaknesses; Belbin's team role theory (shaper, coordinator, plant, resource investigator, team worker, implementer, monitor-evaluator, completer-finisher, specialist); Tuckman's team role theory (forming, storming, norming, performing, adjourning, transforming); Hertzberg's theory (factors which produce job dissatisfaction – company policy, supervision, salary, interpersonal relations, working conditions – are separate from those that produce job satisfaction – achievement, recognition, work, responsibility); Hayes's change management theory (six components of effective change – management practice, vision for change, leadership, planning and organisation, communication, consultation, support)

Learning outcomes	Assessment criteria		Unit amplification
	2.3	Explain the purpose of treating others with honesty and consideration	<ul style="list-style-type: none"> □ Purpose of treating others with honesty and consideration: openness about mistakes and own performance, adherence to rules in handling valuables, prompt notification if mistakes made in own favour (overpaid salary, honesty over reasons for time away from work, admittance of areas of ignorance); better work atmosphere; to make job easier (by admitting own ignorance and asking for help); more likely to receive consideration from others if treating them with consideration; maintaining team objectives and flow of work
3	3.1	Explain the purpose of effective communication with other people in a team	<ul style="list-style-type: none"> □ Effective communication: importance (to develop and sustain good working relationships, to pass on accurate and timely information to other people); features of effective communication (accurate in every detail, concise and clear, complete, valid, be in the most appropriate format, timely)
	3.2	Compare different methods of communication within and to teams and when to use them	<ul style="list-style-type: none"> □ Verbal methods of communication: focusing on what others are communicating; questioning when unsure; adapting communication to meet the needs of others; making positive contributions to discussions; acknowledging others' views; showing confidence when communicating; methods (making and receiving telephone calls, contributing to discussions, leading and participating in meetings) □ Non-verbal communication: body language (facial expressions, eye contact, gestures, posture, spacing, touch); impact on others (can have greater impact than speech) □ Written communication: types (letters, memos, reports, email); importance of presenting positive image of self and organisation (using clear, professional language, correct spelling and grammar, good presentation skills when creating written documents)

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ Using most appropriate method: identifying most appropriate method of communicating to meet the needs of other people (emails, meetings, formal and informal, memos, letters, website entries, adaptations); choice of method; level of detail; use of jargon; choice of language; use of graphics; importance of adapting methods of communicating to meet different needs (to make communication more effective, to make people feel valued, to enhance working relationships)
4	<p>3.3 Explain the purpose of encouraging contributions from others</p> <p>4.1 Explain the purpose of assessing own work and the work of a team</p>	<ul style="list-style-type: none"> □ Encouraging contributions from others: importance (to motivate team members, recognising achievements, encouraging ideas, encouraging others to take the lead, challenging methods of working) □ Purpose of assessing own work: importance (to develop own skills, to gain personal satisfaction, to enhance organisation's competitive position) □ Purpose of assessing work of a team: to ensure that work is to a correct standard; to motivate team members; to show team members how an individual's objectives fit in with the team and organisational objectives
	4.2 Describe ways of assessing own work and the work of a team	<ul style="list-style-type: none"> □ Ways of assessing own work: carrying out a skills audit of own personal work-related skills with those needed for current work role and intended future work roles; personal skills (writing skills, speaking skills, listening, dealing with stress, presentation skills, time management, IT skills); leadership skills (leading by example, motivating, communicating, influencing and persuading, planning, setting objectives, providing feedback, coaching, mentoring, empowering, managing conflict); continually monitoring and improving work; receiving feedback from others; setting high standards; taking on new challenges; learning from others

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ Ways of assessing the work of a team: monitoring progress and quality of work through listening, observation, questioning, asking others (customers, colleagues, managers); dealing with problems, involving team in decision-making; taking corrective action where necessary
4.3	Explain the purpose of giving and receiving constructive feedback	<ul style="list-style-type: none"> □ Giving and receiving feedback: purpose (to reinforce positive behaviours, to learn, to continuously improve own work, to evaluate work activities, to understand own impact on others); methods of feedback (formal, informal, appraisal, review, personal development planning); legal issues (discrimination on grounds of sex, race, disability, sexual orientation and religion); preparing to give feedback (choosing an appropriate time and place, gathering facts and examples of performance, asking other people where appropriate)
4.4	Describe ways of giving and receiving constructive feedback	<ul style="list-style-type: none"> □ Types of feedback: positive (giving praise for achievements); negative (commenting on problems and areas for improvement); constructive (places the stress on positive achievements without trying to avoid negative feedback); less constructive (emphasises the negative without making suggestions for improvement) □ Ways of giving or receiving feedback: sources of feedback (360° appraisal from different people in workplace, performance reviews, informal communication with others in workplace, customer feedback)

Information for tutors

Delivery

All the learning outcomes in this unit lend themselves to flexible delivery. Formal tutor input could identify some of the theoretical material, but learners can work individually and in groups researching and gathering information about team working and methods of communication. Case studies, simulations, team activities, role play and video recordings all offer approaches to learning that show how to develop working relationships within teams and between team leaders and team members. Learners can also refer to experiences from employment or group work, or from reviewing case studies.

Assessment

This unit is assessed through an onscreen test. Pearson will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resources

Books

Ashley V and Ashley S – *Business and Administration Student Handbook Level 3: To support all Level 3 Vocational Qualifications in Business and Administration* (CfA, 2006) ISBN 9780955092015

Belbin M – *Team Roles at Work* (Butterworth-Heinemann Ltd, 1996)
ISBN 9780750626750

Bevan J, Dransfield R, Goymer J and Richards C – *BTEC Level 3 National Business Student Book: B1 (Level 3 BTEC National Business)* (Edexcel, 2010)
ISBN 9781846906343

Carysforth C, Chadwick A and Rawlinson M – *NVQ Level 3 Business and Administration Student Handbook, 3rd Edition* (Heinemann, 2006)
ISBN 9780435463342

Journal

People Management (Chartered Institute of Personnel and Development)

Websites

www.cfa.uk.com	Council for Administration
www.cipd.co.uk	Chartered Institute of Personnel and Development
www.belbin.com	Dr Meredith Belbin's website on team role theory

Unit 5: Principles of project management

Unit reference number: A/601/7652

QCF level: 3

Credit value: 2

Guided learning hours: 16

Unit aim

This unit is about the background knowledge and understanding needed to take part in or run a project in a business environment.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes	Assessment criteria	Unit amplification
1 Know the difference between routine work and taking part in a project	1.1 Describe the difference between routine work and taking part in a project	<ul style="list-style-type: none"> <li data-bbox="491 172 746 1227">□ Features of a project: one-off undertaking; activities designed to meet the defined objectives of the project; client or sponsor; work carried out by project team members; managed through a project team with project team leader; team members selected in accordance with requirements of project; team members may be drawn from different work teams; pre-determined start and end dates; work completed within specified constraints <li data-bbox="754 172 898 1227">□ Features of routine work: repeating; carried out in accordance with laid down procedures; part of established job roles; contributes to providing products or services on an on-going basis; managed through line management structure; continues indefinitely into the future <li data-bbox="906 172 1002 1227">□ Differences between routine and project work: uncertain activities and processes; different colleagues and team leader; opportunities to help to decide how to achieve objectives; temporary role

Learning outcomes	Assessment criteria	Unit amplification
<p>2 Understand how to prepare for and plan a project</p>	<p>2.1 Explain why it is important to agree the purpose, scope, timescale, resource requirements, budget, aims and objectives of a project</p>	<ul style="list-style-type: none"> □ Agreeing purpose, aims and objectives of project: identifying stakeholders (employing organisation, sponsor, funding organisation, project team, customers); identifying sponsor (person or organisation funding, supporting and/or initiating project); aims and objectives of sponsors, identifying the aim (what the project is designed to achieve); objectives (specific ways in which the project is to achieve the aim expressed in terms that are specific, measurable, achievable, realistic and time bound) □ Importance of agreeing purpose, aims and objectives: to make sure project is planned to meet sponsors' needs; to ensure that stakeholders' needs are taken into consideration; to set appropriate and clear priorities; to identify risks of project not meeting sponsors' needs at an early stage; to enable sound decisions as to whether project goes ahead or not □ Agreeing scope: precise definition of parameters of project (deliverables, objectives, data to be used in research project, products/services/processes/sections of organisation to be included, whether peripherals such as training in new systems are included, quality standards in terms of accuracy, presentation, adherence to organisational quality standards) □ Importance of agreeing scope: to enable realistic budgeting and resourcing decisions; to check that budget and resources are adequate to meet objectives; to avoid project creeping into areas not agreed; to enable budget deliverables to be on-time and on-cost □ Timescale: definition; milestones as points of partial completion; deliverables at each milestone □ Importance of agreeing timescales: satisfy sponsors' needs; enable accurate resource planning; enable project progress to be monitored against delivery at milestones; secure most important deliverable at earliest possible stage; ensure that priorities are clear to all

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> <li data-bbox="245 170 555 1227">□ Resource planning for a project: identifying human resource requirements (skills, experience, any necessary qualifications, amount of time, number of people, timing of human resource requirements); identifying physical resource requirements (accommodation, equipment, furniture, stationery); identifying financial requirements (amount and timing of financial requirements); identifying communications requirements (telephones, email addresses, meeting space, teleconferencing); contingency planning (allowing extra resources to be used in case of unforeseen changes) <li data-bbox="576 170 778 1227">□ Budget: amount and timing of income and expenditure; need to be clear about constraints such as timing of expenditure and limits to what purchases are allowed; need to agree on resources which may or may not need to be met from project budget (accommodation, equipment, telephones, salaries of project team); need to agree processes for drawing from budget and recording expenditure <li data-bbox="799 170 863 1227">□ Importance of agreeing budget: to check that it is possible to meet objectives within budget; to enable project planning to take place <li data-bbox="884 170 1018 1227">□ Project plan: activity list; allocation of resources to activities; estimation of times and costs; prioritising of activities; setting of milestones for all team members; production of Gantt chart showing activities against estimated time needed and time allowed

Learning outcomes	Assessment criteria	Unit amplification
	<p>2.2 Describe how to identify and plan for project issues and risks in an area of work</p>	<ul style="list-style-type: none"> □ Project issues and risks: activities creep beyond original scope of project; unforeseen activities needed to enable objectives to be achieved; activities take longer than estimated; members of project team not available as planned; equipment not available as planned; equipment failure; stationery or other resources not available as planned; members of project team make mistakes or underperform; budget not available when needed □ Identifying and planning for project issues and risks: all team members identify risks; assess each risk in terms of likelihood and consequences; identify warning signs or triggers for each risk; identify preventative actions (check understanding of scope, check activity list, check estimates of time needed, confirm availability of team members and equipment, test equipment, plan project team meetings and communications carefully, check skills of team members, provide training if needed); identify contingency plan for highly rated risks (identify other people with appropriate skills who could join team if needed, identify sources of equipment that could be used if needed, allow extra time where there is little experience); allocate individual to monitor for each risk identified

Learning outcomes	Assessment criteria	Unit amplification
3	<p>3.1 Understand how to monitor a project</p> <p>Identify methods that can be used to monitor the progress of a project</p>	<ul style="list-style-type: none"> □ Monitoring a project: progress reports from team members on pre-determined dates; project team meetings; comparison of delivery with milestones; collection of data (quantity, quality measures); benchmarking with similar projects; use of Gantt chart; use of project management software; critical path analysis (identification of activities which are critical to on-time completion); budget monitoring (identification of variances from planned income and expenditure); probing of any bottlenecks leading to early changes to project plan to enable objectives to be met □ Purpose of meeting agreed targets within a project: to enable some deliverables to be used at an early stage; to confirm that plan is likely to work; to gain access to project resources for subsequent stages of project; to highlight shortcomings and identify remedial actions needed if targets are not met
	<p>3.2 Explain the purpose of reporting progress during a project</p>	<ul style="list-style-type: none"> □ Reporting progress on project: purposes (to ensure that project is on track to achieve objectives, to take preventative actions if project is not on track, to inform planning for future related projects, to enable scope, objectives or resources to be adjusted to meet changing priorities)
	<p>3.3 Explain the purpose of meeting agreed targets within a project</p>	<ul style="list-style-type: none"> □ Purpose of meeting agreed targets within a project: to enable some deliverables to be used at an early stage; to confirm that plan is likely to work; to gain access to project resources for subsequent stages of project; to highlight shortcomings and identify remedial actions needed if targets are not met

Learning outcomes	Assessment criteria		Unit amplification
4	4.1	Explain the purpose of evaluating a project	<ul style="list-style-type: none"> □ Evaluating a project: purposes (learn from successes or shortcomings, develop project working skills within team members, develop project management skills, develop improved organisational project management systems, contribute to building good working relationships, identify need for further project work in same or related area)
	4.2	Identify ways of evaluating a project	<ul style="list-style-type: none"> □ Ways of evaluating a project: collect information on achievements and compare with objectives; employ independent evaluator; hold evaluation meeting (note achievements, discuss what went well, what could have been done better), obtain feedback from stakeholders; probe reasons where plan and actions differed □ Evaluation report: quantify and evaluate achievements of project, compare plans with what happened; analyse data on quality of deliverables against agreed quality standards; final financial accounting and explanation of any variances; identification of practices that worked well and those that did not work well □ Evaluation of performance of project manager and team members: information is confidential; evaluation of performance and scope for development; integration of evaluation of project work into organisational appraisal and career development systems

Information for tutors

Delivery

The content of this unit can be delivered in a classroom environment, using case studies to develop knowledge and understanding of project management terminology and methodology and the appropriateness of the methodologies used for specific projects. It would be beneficial to learners to have some exposure to realistic business projects to grasp the value and importance of project management methodology and to gain an understanding of how a project is managed from conception through to completion. This could be achieved through simulations, group work and role-play.

Assessment

This unit is assessed through an onscreen test. Pearson will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resources

Books

Bevan J, Dransfield R, Goymer J and Richards C – *BTEC Level 3 National Business Student Book: B1 (Level 3 BTEC National Business)* (Edexcel, 2010) ISBN 9781846906343

Posner K and Applegarth M – *Project Management Pocketbook* (Management Pocketbooks Ltd, 2008) ISBN 9781903776872

Portny S E – *Project Management for Dummies* (Wiley Publishing Inc, 2007) ISBN 9780470049235

Journal

International Journal of Project Management available at website:
www.elsevier.com/wps/find/journaldescription.cws_home/30435/description

Websites

www.bized.co.uk/educators/16-19/business/production/lesson/project1.htm project management section of website which provides free resources for business studies

www.apm.org.uk Website for Association for Project Management from which some resources are available free of charge

Unit 6: Principles of customer service delivery

Unit reference number: L/600/0659

QCF level: 3

Credit value: 6

Guided learning hours: 50

Unit aim

This unit is aimed at enabling the learner to understand how customer service delivery and legislation affects customer expectation. The learner will develop knowledge of the principles of customer service, how behaviour, communication and interpersonal skills will impact on customer expectation and satisfaction. The learner will learn the techniques for dealing with customer service problems and complaints and how legislation affects the customer service process.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes	Assessment criteria	Unit amplification
1 Describe the principles which impact on customer expectations.	1.1 Identify the differences in working in a customer service role within different sectors.	<ul style="list-style-type: none"> □ Public sector goods and services are provided by the government (hospital, school, welfare); profit is not the goal; lacks competition □ Private sector business operates in a dynamic competitive market (retail, manufacturing, service); motivated by profit; focused on building customer loyalty and attracting new customers; service deliverer can be a USP and the competitive advantage for the business □ Voluntary/not-for profit business (charities) operate within a competitive area; aim to make money but not profit motivated
	1.2 Explain what is meant by customer expectations and how these are formed.	<ul style="list-style-type: none"> □ Customer expectation is what the customer expects to receive from an organisation in respect of their product or service. □ How customer expectations are formed: through what they hear, see and read; brand message, mission statement, reputation; company website, comparison websites; word of mouth from family and friends; articles, advertising; style of premises (inviting); price/quality relationship (high price, high quality); through past experience; how they were treated and comparison against treatment from competitor (friendly, welcoming, professional, interested); style of premises (modern, old, cluttered, dark)
	1.3 Describe how to balance the needs and expectations of the customer with those of the organisation.	<ul style="list-style-type: none"> □ How to balance the needs and expectations of the customer with those of the organisation: customer charter setting the standards for the organisation regarding its customer service; negotiate conflicting expectations (timescales, logistics, financial, legal); develop the service deliverer's skills (interpersonal, influencing, communicating, persuading) to reach mutual satisfaction

Learning outcomes	Assessment criteria	Unit amplification
<p>2 Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction.</p>	<p>2.1 Describe how the individual's and the customer's behaviours affect expectations.</p>	<ul style="list-style-type: none"> □ How the service deliverer and the customer's behaviour affect expectations: the action of one behaviour (aggressive, confused, emotional, frustrated, worried, special or cultural needs) causes a reaction in the other that informs their expectations □ Positive polite professional behaviour of the individual leads to high expectations, trust and confidence for the customer □ Negative disinterested behaviour of individual leads to low expectations distrust and anger from the customer
	<p>2.2 Identify and use different methods of communication to meet a range of customer expectations.</p>	<ul style="list-style-type: none"> □ Different methods of communication to meet customer expectations: □ Confidential information; face to face, telephone, letter □ Sensitive information; face to face, telephone □ Important information; telephone, letter, email, text □ General information: letter, email, text, leaflet, internet, intranet, social media, online-communities.

Learning outcomes	Assessment criteria	Unit amplification
2.3	Identify different types of non-verbal communication and their impact.	<ul style="list-style-type: none"> □ Different types of non-verbal communication and its impact: □ Facial expression; smiling and welcoming; frowning and unwelcoming □ Gestures; waving (attracts attention and inviting); pointing (accusing, angry, aggressive) □ Paralinguistic (tone of voice, loudness, inflection, pitch); strong tone (inspires attention, approval, enthusiasm); hesitant tone (disapproval, lack of interest, distrust) □ Body language and posture; relaxed posture, open body language (inspires confidence and trust); arms crossed closed body language (defensive) □ Proxemics (personal space); respect personal space (relaxes, put at ease); enter personal space (aggression, intimidation) □ Written; provides detailed information; convoluted, badly written
2.4	Explain the interpersonal skills, which can be used to achieve customer satisfaction.	<ul style="list-style-type: none"> □ Using interpersonal skills to achieve customer satisfaction: □ Verbal Communication; questions and answers to understand customer needs in order to achieve customer satisfaction □ Non-Verbal Communication; open body language to gain customer trust □ Listening Skills; to interpret both the verbal and non-verbal messages and measure level of satisfaction □ Problem solving; working with customer to identify, define and solve their problem □ Decision making and negotiating; exploring and analysing options that achieve mutual satisfaction

Learning outcomes	Assessment criteria		Unit amplification
	2.5	Identify possible barriers to effective communication.	<ul style="list-style-type: none"> <input type="checkbox"/> Barriers to effective communication: <input type="checkbox"/> Physical; hearing impairment, sight problems, unable to concentrate, tired <input type="checkbox"/> Language; English not first language, accents, use of local words or phrases, jargon, ambiguity, breakdown acronyms and abbreviations <input type="checkbox"/> Other; poor listening skills, lack of communication, lack of discussion, misunderstanding, technology breakdown, environmental constraints.
3 Describe solutions to customer service problems and complaints within organisational constraints.	3.1	Describe techniques for dealing with customer service problems or complaints.	<ul style="list-style-type: none"> <input type="checkbox"/> Techniques to improve customer service problems or complaints: <input type="checkbox"/> Record and monitor complaints; learn from customer experience to improve the service <input type="checkbox"/> Actively listen; establish facts, agree follow-up action, respect customers' viewpoint, questioning for clarification, summarise complaint to check understanding <input type="checkbox"/> Empathise; gain customer confidence and trust, turn from complaint to query <input type="checkbox"/> Keep customer informed/updates as to status of query/complaint <input type="checkbox"/> Know limits of authority; analyse problem and negotiate or escalate

Learning outcomes	Assessment criteria	Unit amplification
3.2	Describe the factors that need to be considered when finding a solution to a customer service problem.	<ul style="list-style-type: none"> □ Factors that need to be considered when finding solutions to a customer service problem: □ Compliant with legislation; Sale of Goods Act, Supply of Goods or Services Act, Data Protection Act □ Cost to the organisation; cheaper to supply new or repair problem, resource availability □ Time restraints; warranty, guarantees, KPI's □ Organisational requirements; limits of own authority, escalation □ Empathy not sympathy; avoid emotional reaction to customers problem □ Show appropriate behaviour towards customer needs; listen and take ownership of their query
3.3	Identify solutions to customer problems and complaints.	<ul style="list-style-type: none"> □ Solutions to customer problems and complaints: □ Offer an alternative □ Offer a replacement □ Offer a refund □ Offer compensation □ Negotiate within personal authority limitations
3.4	Explain why a complaint should be viewed in a positive manner.	<ul style="list-style-type: none"> □ Why a complaint should be viewed positively: □ Provides formal feedback of the products or service □ Resolving a complaint swiftly can result in customer loyalty □ Highlights weaknesses in organisation systems or procedures, giving the organisation an opportunity to improve.

Learning outcomes	Assessment criteria	Unit amplification
	<p>3.5 Describe how the use of record keeping systems help manage and support the customer service process.</p>	<ul style="list-style-type: none"> □ Keeping record systems, records customer purchasing history, provides a profile of potential future spending, where to target new products and improve the customer service. □ Recordable data includes: <ul style="list-style-type: none"> □ Personal data; customer's name, address, account details, previous purchases □ Customer feedback on a product or service; user evaluation, warranty/guarantee records □ Purchasing history; most commonly purchased product □ Record of complaints □ Recorded data manages and supports the customer service process by: <ul style="list-style-type: none"> □ Stock turnover; informs on quantity required for products to be held in stock and avoid disappointing customers □ Customer profile; (geographical location, age, gender) to personalise the customer service □ Target sales opportunities; inform customer when similar products or new versions are available □ Target loyalty schemes; offer personalised discount, offers, vouchers

Learning outcomes	Assessment criteria	Unit amplification
4	<p>4.1 Explain how legislation affects the customer service process.</p>	<ul style="list-style-type: none"> □ Legislation protects the consumer when buying goods or services, organisations have a legal obligation to incorporate the relevant legislation into their customer service policies and processes, and inform the consumer of their statutory rights. □ Sale of Goods Act; goods must be as described, fit for purpose, satisfactory quality; if goods do not conform to contract, purchaser can request, refund, repair or replacement. Regulations within Sale of Goods Act □ The Consumer Protection (Distance Selling) regulations □ The Unfair Terms in Consumer Contracts regulations □ The Sale and Supply of Goods to Consumers regulations □ Supply of Goods and Services Act; service provided by tradesmen and professionals must be carried out with reasonable care and skill, within a reasonable time and charge; must be described, of satisfactory quality, fit for purpose; breach of contract can lead to consumer claiming compensation, repair or replacement □ Unsolicited Goods and Services Act; protects the customer from goods or services not ordered by them □ Trade Descriptions Act; prohibits the false description (verbally, in writing, advertisement, packaging/labelling, implication) of goods given, supplied or offered for supply by an organisation or individual □ Consumer Protection Act; safeguards the customer from products that do not reach a reasonable level of safety, compensation can be claimed where a product is proven to cause harm or injury □ Data Protection Act; maintains the security and confidentiality of customer details and lays down principles for handling personal information

Learning outcomes	Assessment criteria	Unit amplification
	<p>4.2 Identify and explain the relevant legislation relating to customer record keeping and its implications.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Health and Safety at Work Act; safety of the customer environment <input type="checkbox"/> Equality Act; legally protects people from discrimination in the workplace and in wider society <input type="checkbox"/> Relevant legislation relating to customer record keeping: <input type="checkbox"/> The Data Protection Act regulates the collection, storing and sharing of information (paper, electronic) of customers. The Act has 8 principles that cover the storage and use of data: <ul style="list-style-type: none"> <input type="checkbox"/> Processed fairly and lawfully <input type="checkbox"/> Obtained for specified and lawful purposes <input type="checkbox"/> Adequate, relevant and not excessive <input type="checkbox"/> Accurate and up to date <input type="checkbox"/> Not kept any longer than necessary <input type="checkbox"/> Processed in accordance with the 'data subject's' (the individual's) rights* <input type="checkbox"/> Securely kept <input type="checkbox"/> Not transferred to any other country without adequate protection in place. <input type="checkbox"/> Implications: access to personal information, prevent processing likely to cause damage or distress, prevent processing for direct marketing, automated decision making, compensation, rectification, blocking, erasure & destruction, jurisdiction and procedure. Appropriate measures shall be taken against unauthorised or unlawful processing of personal data and against accidental loss, destruction or damage to the data. <input type="checkbox"/> Organisations need to be aware that appropriate measures can be taken when there is unauthorised or unlawful processing of personal data, in the form of a penalty from the UK Information Commissioner's Office, as well as possible loss of business and brand damage

Learning outcomes	Assessment criteria	Unit amplification
	<p>4.3 Explain the importance of maintaining security and confidentiality of data.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Maintaining security and confidentiality of data is important as: <input type="checkbox"/> a legal requirement (Data Protection); it's a criminal offence where breached <input type="checkbox"/> it is an organisation's ethical responsibility to securely maintain information to safeguard customers and prevent competitors gaining access to it <input type="checkbox"/> customer may feel betrayed and move to a competitor if they feel their security has been breached <input type="checkbox"/> it can become a USP or competitive advantage for the organisation
	<p>4.4 Define different forms of contracts and describe what makes a contract binding.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> A contract requires three factors to be binding: <ul style="list-style-type: none"> <input type="checkbox"/> an offer <input type="checkbox"/> an acceptance <input type="checkbox"/> consideration <input type="checkbox"/> Forms of contract: <ul style="list-style-type: none"> <input type="checkbox"/> Express contract; parties state and agree the terms at the time of its formation (terms of agreement, credit facilities, price and discount) <input type="checkbox"/> Implied contract; an obligation arising from a mutual agreement and intent to promise, which have not been expressed in words <input type="checkbox"/> Executory contract; where some future act or obligation remains to be performed according to its terms <input type="checkbox"/> Bilateral contract; the exchange of promises between entities that entails their performance of an act <input type="checkbox"/> Unilateral contract; the offeror makes a promise of payment or other consideration, the offeree performs the act

Learning outcomes	Assessment criteria	Unit amplification
	<p>4.5 Explain the purpose of codes of practice and describe their relationship to customer service.</p>	<ul style="list-style-type: none"> □ A Code of Practice: written guidelines issued by an official body or a professional association to its member organisations on how to comply with its standards; offers guidance to its customers on standards to expect from its member organisation; how to make a complaint. □ The code of practice focuses on the relationship between its member organisation and the customer, on matters of: <ul style="list-style-type: none"> □ how the member organisation should conduct their business □ how to handle customer complaints □ guiding customers on how to make a complaint □ ethical best practice and behaviour

Information for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of customer service delivery. Learners should know and understand appropriate behaviour to use with customers and how to deal with customer queries, request and problems.

Learners should be encouraged to engage with customers, employers and where possible, other employees, to further enhance their knowledge and understanding of customer service delivery.

Perspectives on the delivery of customer service, gained through engaging with customers, employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners serving customers and working with other customer service deliverers, where possible, and through the use of guest speakers and visual based training programmes.

This unit could be delivered through distance learning, however, this will involve additional and different considerations, such as planning and other measures to ensure the learners can gain required knowledge and understanding

Assessment

This unit is assessed through an onscreen test. Pearson will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resources

Books

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007) ISBN 139780435465292

Carlaw P & Deming PK – *The Big Book of Customer Service Training Games* (McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006) ISBN 139780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 139780135063972

Journal

Customerfirst (Institute of Customer Service)

Websites

www.cfa.co.uk

Council for Administration

www.instituteofcustomerservice.com

Institute of Customer Service:

Unit 7: Principles of budgets in a business environment

Unit reference number: F/601/7653

QCF level: 3

Credit value: 2

Guided learning hours: 16

Unit aim

The aim of this unit is to enable the learner to understand the purpose, development and management of budgets in a business environment.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the purpose of budgets in a business environment	1.1 Explain the purpose of budgets for managing financial resources to meet business requirements	<ul style="list-style-type: none"> □ Budgets: definition (a quantitative statement for a defined period of time which can include planned revenues, expenses, assets, liabilities and cash flows); features of budget (based on the policies needed to meet the objectives of the organisation, quantitative data is usually translated into monetary terms) □ Types of budget: master budget (overall financial planning mechanism for an organisation, consists of separate but interdependent budgets, the 'trading and profit and loss account' and 'balance sheet' that is expected at the end of the selected time period, provides terms of reference for functional budgets); advantages of a master budget (can give an idea of where a company wants to go and what it has to do in order to get there, allows realistic projection of future cash flows which in turn would help in getting certain types of financing; disadvantages of a master budget) the time involved in producing such a budget, uncertainty of accurately forecasting the future □ Sales budget: importance (the starting point to prepare the master budget, forecasts the amount of expected sales and units of production in the budget period), produced by analysing sales from previous years, surveying customers; estimated in units of production and cash values □ Production budget: based on the sales budget to calculate what needs to be manufactured and when, used for planning staffing requirements □ Materials budget: covers direct material costs to help calculate overall direct costs, helps identify where cheaper materials might be used to reduce costs

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ Labour budget: developed from the production budget; important for the business to develop plans to adjust staffing needs □ Overhead budget: schedules all costs of production except direct materials and labour; how it is set (using last year's costs for expenses including insurance, administration, rent, rates, equipment, machinery, salaries, advertising, promotion) □ Capital budget: part of the business plan; planning device for new investments or fixed assets (acquisition costs, building costs, major repair costs); there are differences with operating budget (most capital purchases are depreciated rather than expensed in the current year, typically financed with medium- to long-term debt) □ Purposes of budgets: managing financial resources (to control income and expenditure, makes sure planned spending is affordable and in line with the organisation's strategy, needed for forecasting the income expected to be made from sales); facilitates coordination of departments, motivates employees to achieve agreed and set performance targets, allows day-to-day management and control, resolves conflicts of interest between departments), enables organisation to identify variances at an early stage □ Meeting business requirements: enables organisation to allocate future spending according to organisational priorities, enables the allocation of resources, enables full responsibility to be delegated to managers across the organisation for departments, functions or projects, to improve efficiency, frees up senior managers to focus on strategic issues, enables remedial action to be taken when there is a deviation from the plan; motivates managers and staff (provides a focus to achieve goals, evaluates how effectively the department is run, to enable delegation without loss of control, by offering bonuses to managers and staff for not exceeding budgets); plays a major role in communicating ideas and plans

Learning outcomes	Assessment criteria	Unit amplification
2	Understand how to develop budgets	<ul style="list-style-type: none"> □ Implications if budgets are not set: inability to compare actual results with budgeted results, unable to take corrective action; if labour requirements are not budgeted this can lead to inefficiency, low morale, insecurity
2.1	Explain the purpose of agreeing the format in which a budget will be presented	<ul style="list-style-type: none"> □ Budget formats: spreadsheet or accounting software in tabular form with sub-headings common across the organisation; typical expenditure headings (salaries, staff training, office equipment, consumables, travel, services, vehicle maintenance); typical time period headings (months in the budgeting period, weekly basis for cash budget) □ Purpose of agreeing format: to enable budgets to be easily understood; to enable income and expenditure data from all budgets to be collated into master budget; to ensure there is a degree of commonality across the business; to enable comparisons to be made across the organisation when agreeing budgets; to enable easy monitoring of actual financial performance against planned income and expenditure □ Ways of preparing budgets: top-down budgeting (where senior managers prepare the overall budget then divide into departmental budgets, operational managers may be consulted but not always and are expected to work within it); bottom-up budgeting (created by operational managers through analysing the cost implications of their work, these should be realistic as they are created by those who really 'know', there will be greater commitment by those who shared in the budget creation, may be lack of full understanding of the company's goals and the market conditions in which the company operates).
2.2	Explain the purpose of using estimations when developing a budget and ways of doing so	<ul style="list-style-type: none"> □ Estimations: forecasts of amounts and timing of income and expenditure over specified future budget period □ Purpose of using estimations when developing budgets: to enable budgets to be produced using best available data; to follow organisational guidelines for estimating staff or overhead costs; to fulfil purposes of budgets as listed above

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> <li data-bbox="296 176 986 1227">□ Ways of developing estimations: incremental budgeting (based on last period's budgets increased by small amounts); advantages of incremental budgeting (a quick and easy way to produce a budget, less conflict between departments if they are seen to be treated similarly, budget is stable and change is gradual); disadvantages of incremental budgeting (fails to identify opportunities for efficiencies, encourages spending the budget to ensure full allocation next year, no incentive for reducing costs or developing new ideas, the budget may no longer be relevant for the activity or task); priority incremental budgeting (increase based on previous budgetary period's budget with agreed prioritising according to organisational objectives); zero-based budgeting (where all or part of the budget is fully justified for each budgetary period); advantages of zero-based budgeting (more efficient allocation of resources as based on needs and results, encourages managers to question and justify every item, helps identify areas of waste, increases staff motivation as it engages staff with the process); disadvantages of zero -based budgeting (a time -consuming and complex process, can affect internal politics through conflicts about budget allocation, focuses on short -term benefits to the detriment of long-term planning, requires lots of skills to do effectively) <li data-bbox="1011 176 1382 1227">□ Agreed assumptions used when estimating budgets: assumptions underlie each line item within a budget; importance of agreeing assumptions (makes a budget clear to everyone concerned, getting budget assumptions as close as possible to the real situation is the essence of good budgeting); assumptions may be made about fixed costs that remain constant irrespective of the level of activity (rent, insurance, interest on loans, depreciation); variable costs vary in direct proportion to the activity (raw materials, components); some costs may be semi-variable (electricity, telephone charges); assumptions that economic conditions will remain stable; assumptions made outside the manager's

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ control should be considered areas of cost risk and managed accordingly (last year's expenses will not increase, everything will go according to plan, funds can be raised without a plan) □ Use of data in estimating for budgets: internal sources of data (sales trends, budget for previous budgetary period, business plans, review of variations from previous or similar budgets, knowledge held by budget-holder); external sources of data (inflation statistics, forecast price changes, labour market data, commodity forecasts); problems with using data from information of performance in previous years (could repeat errors, this would lead to unnecessary spending)
2.3	Explain the purpose of identifying timescales, priorities and financial resources needed when preparing a budget and ways of doing so	<ul style="list-style-type: none"> □ Timescales: budget time horizon (the immediate future period of 12 months where the consequences of actions can be predicted with a reasonable degree of certainty as they are based on past business decisions); business planning horizon (typically a 3-5-year period over which future forecasts can be made with reasonable confidence); strategic planning horizon (typically 5+ years in the future as it is concerned with the long -term aspirations of senior managers); set budgetary period or rolling budgetary period (agreeing budgets for an extra month, quarter or year each month/quarter/year) □ Purpose of identifying priorities: to help strategic planning process (enabling senior management to allocate adequate financial resources towards achieving most important priorities for the organisation); to help manage change more effectively; used as a planning and monitoring tool; to be clear and understandable for the people who are involved; to be challenging but achievable (to contain clear financial measures with times attached) □ Purpose of identifying financial resources needed: to enable accurate estimate of required budget to be made; to enable organisational objectives to be achieved; to enable planned procurement of resources; to justify budgetary requirements when negotiating budget for department, function or project

Learning outcomes	Assessment criteria	Unit amplification
	<p>2.4 Describe the purpose of negotiating and agreeing a budget</p>	<ul style="list-style-type: none"> □ Negotiated budgeting: somewhere between the two extremes (where managers are given general parameters such as increases in salary costs then prepare a draft budget, senior management adjust this to ensure it fits with other parts of the organisation); benefits of negotiating budget (motivates staff, enables staff to develop and take ownership of own area, allows the discussion of assumptions, helps achieve organisational objectives) □ Purpose of agreeing budget: importance of agreeing budgets with master budget holder (enables managers to fully understand budgetary constraints and organisational plans, enables all managers to feel ownership of resourcing decisions, enables managers to explain budgetary decisions to staff, improves motivation and builds positive working relationships)
<p>3 Understand how to manage budgets</p>	<p>3.1 Explain the purpose of monitoring, controlling and recording income and expenditure</p>	<ul style="list-style-type: none"> □ Income: allocation of funds from master budget; forecast of sales revenue; grant or public sector funding; income based on pre-determined amount or varied with level of sales or services provided □ Expenditure: staffing costs (wages, salaries, consultants' and contractors' fees, recruitment costs, National Insurance, superannuation, pensions, tax, cover for sickness and other absences, training costs); overhead costs (rent, mortgage, insurance, maintenance and repairs, heating, water, air conditioning, telecommunications, access to internet, cleaning, postage); capital expenditure on machines and equipment, (computers, phones, copiers, printers, equipment specific to organisational needs); expenses including transport (vehicles and running costs, fares for flights, rail travel, taxis, car hire, subsistence, reimbursement of costs for using vehicles belonging to employees or contractors); material costs on consumables (stationery, printer cartridges, toners; advertising, promotion and entertainment; bad debts, finance charges, depreciation, legal and professional costs; fixed costs which stay the same regardless of how much work is done (rent, rates, interest charges, repayments of loans, insurance, salaries); variable costs which change according to workload (raw materials, fuel, power,

Learning outcomes	Assessment criteria	Unit amplification
		<p>wages)</p> <ul style="list-style-type: none"> □ Monitoring budgets: purpose of monitoring (to measure actual performance, to compare actual performance with the budget, to analyse any variances); using variance analysis (the process used to identify then analyse any differences between the budgeted and actual income and expenditure); importance of variance analysis (enables managers to identify problems which need further investigation, enables managers to take remedial action); information required to analyse sales variances (the range and number of each product to be sold, the selling price of each product, the respective periods in which sales are to take place); total cost variance is analysed into different variances (direct material, direct labour, variable overhead, fixed overhead); cause of variances (price that is different from planned, volume that is different from planned); variances are favourable (result is better than expected, revenue increased or costs lower) or adverse (result is worse than expected, profit reduced or costs higher); possible causes of identified variances (changes in policy such as telephoning more customers, changes in timing such as delaying the purchase of a piece of equipment, changes in raw materials costs, unforeseen events such as equipment needs replacing, operating problems such as consistent overspending) □ Controlling: budgetary control is achieved by comparing actual costs, revenues and performances against the set budget.; advantages to controlling budgets (compels management to plan for the future by setting plans, promotes coordination and communication across the organisation, defines areas of responsibility for the business operations, provides a basis for performance appraisal, enables remedial action to be taken, motivates employees by giving involvement); responsibility centres as a functional unit headed by a manager responsible for that unit (investment centres, profit centres, revenue centres, expense centres); implications of failing to control budgets (frequent over- or under spending, a lack of up-to-date information which would explain why the actual results will be at variance with the budget, signifying that the team/department/work is out of control, bad advertisement both for the organisation and individual)

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> <li data-bbox="288 170 839 1227">□ Recording income and expenditure: different methods used to create monthly and annual financial statements (spreadsheets, generic accounting packages, organisations' own customised software, automated data collection such as bar coding); based on coding income and expenditure according to budgets; ability to perform regular variance analysis; advantages of using electronic methods over manual methods to record (quicker processing, cheaper as less labour intensive, allows automatic complex calculations, can use 'what-if' scenarios for more accurate forecasting, more data storage facilities, professional looking documents, can be used to review data and identify trends, growing emphasis on e-filing when submitting records); disadvantages of using electronic methods over manual methods to record (can suffer power failures and loss of data, hardware failure, difficulty to spot and correct errors with a large volume of data, can be open to fraud, mistakes can go unnoticed if multiple users input data incorrectly, staff need training to use it) <li data-bbox="863 170 1062 1227">□ Accuracy in recording: importance (enables effective monitoring, to identify whether there is a need to adjust prices; accurate coding of items of income and expenditure required; prompt recording of transactions required to enable budget to be monitored and controlled; records should be kept of expected income or committed expenditure to enable effective monitoring) <li data-bbox="1086 170 1399 1227">□ Purpose of monitoring and controlling income and expenditure: to monitor results; to identify sources of wastage; to enable changes to be made to income and expenditure to conform to agreed budget; to enable causes behind variances to be investigated and calculated; to evaluate the significance of the variance; to take corrective action; to enable organisation to exploit unforeseen opportunities (increased demand for product or service, reduced costs); to ensure that organisation avoids unplanned over-expenditure; to guard against insolvency; to aid decision making

Learning outcomes	Assessment criteria	Unit amplification
		<ul style="list-style-type: none"> □ Purpose of recording income and expenditure: to enable monitoring and controlling of income ; to enable organisation to reallocate budgets where necessary to avoid insolvency; to meet revised priorities or exploit opportunities; to enable auditing to take place; to provide openness and accountability over financial matters; to maintain organisation's reputation for sound financial management
	<p>3.2 Describe situations in which revisions to the budget and/or plans may be needed</p>	<ul style="list-style-type: none"> □ Revisions to budgets: purpose of revising budgets (to make changes to the budget to increase the company's financial standing); revision process (analysing reasons for any shortfall such as lower sales volumes, flat markets, underperforming products, considering reasons for a particularly high turnover such as whether targets were too low comparing the timing of income with projections and check that they fit); to check actual expenditure (how fixed costs differed from budget, how variable costs were in line with budget, to analyse any differences in timing of expenditure); renegotiation of budget with master budget holder or manager before end of budget period □ Situations in which revisions to the budget of plans may be needed: situations arising from unforeseen internal or external changes □ Unforeseen external changes: increase or decrease in sales or other income; changes to pension and National Insurance contributions; increase or decrease in costs such as commodity price changes; increased salary costs; changes in legislation affecting costs; increase in interest rates charged for borrowing; reduced availability of loans or overdrafts; changes to sales or costs in another area of the organisation's work; changes to how competitors do things □ Unforeseen internal changes: changes to priorities or business plans; changes to ownership or governance of organisation leading to revised priorities; original budgets based on poor estimates; inadvertent over-expenditure of budget; poor monitoring and control of budgets; changes to staffing structures

Information for tutors

Delivery

This unit gives learners an insight into the use of budgets within a business environment.

The content of the unit may be delivered in a classroom environment in order to introduce learners to the purpose and principles of budgeting.

It is advisable to involve learners in practical activities as much as possible when delivering this unit. It is also helpful for learners to understand from the outset the potential problems for businesses that do not plan carefully.

Learners could take part in role play situations where they act as consultants to potential business owners to advise on the importance of planning, agreeing, monitoring, controlling in addition, revising budgets. They could also work in groups to analyse a budget for a small business, and suggest actions that should be taken to improve future finances.

Speakers can help to bring this unit to life, for example, guest speakers from SMEs (small and medium enterprises), to say how they approach a particular topic or to recount their own experiences. The local Chamber of Commerce may be able to suggest a business adviser or consultant who can talk to the class about the importance of budgeting for a business.

Learners should also be encouraged to visit high street banks to see what literature is available on financial planning in business, as well as visiting their websites. Banks or local accountancy practices may also be willing to provide guest speakers on budgeting.

Assessment

This unit is assessed through an onscreen test. Pearson will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resources

Books

Bevan J, Dransfield R and Goymer J, Richards C – *BTEC Level 3 National Business Student Book: B1 (Level 3 BTEC National Business)* (Edexcel, 2010) ISBN 9781846906343

Institute of Management – *Budgeting and Financial Control* (Butterworth-Heinemann, 1997) ISBN 9780750636681

Shim J and Siegel J – *Budgeting Basics and Beyond* (John Wiley and Sons, 2008) ISBN 9780470389683

Journals

Accountancy (CCH)

Accounting Technician (Centurian Publishing Group)

Websites

www.aat.org.uk	Association of Accounting Technicians
www.accountingweb.co.uk	Accounting news, information and case studies
www.businesslink.gov.uk	Business Link – the official government website for businesses of all sizes
www.bizhelp24.co.uk	Help and support for business

Unit 8: Understand the role of marketing and advertising in live events and promotion

Unit reference number: K/601/6321

QCF level: 3

Credit value: 2

Guided learning hours: 16

Unit aim

This unit is about understanding how live events and promotions are marketed. The learner will gain knowledge of how advertising proposals and campaigns are produced for live events and promotions. The learner will understand how to consult effectively with colleagues and other stakeholders during the development of the proposals. In addition, the learner will examine the advertising strategy of an organisation and evaluate the value and effectiveness of the advertising and other publicity for an event. The impact of regulatory and ethical requirements upon advertising is also explored.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the role of advertising and marketing.	1.1	Describe key campaign production processes, including television, press, print, on-line and digital.
		1.2	Describe key topics to be addressed within an advertising proposal.
		1.3	Explain the importance of reach, frequency and impact in achieving advertising objectives, and the relative advantages and limitations in these respects of the main advertising media types
		1.4	Describe how to identify potential risks in relation to the achievement of objectives.
			<ul style="list-style-type: none"> □ Production processes: artist interviews (TV and radio), sponsorship, traditional methods (leaflets, posters, billboards), new methods (web pages, social internet) □ Key topics: client information/needs, target market, advertising strategy □ Advantages/disadvantages of main media types: cost, reach, audience, frequency, timing, lead times, impact □ Identification of risks in achieving objectives: current or future events which could have a potentially negative impact on achievement of objective: (low ticket sales, cancellation of the event, public support, rising expenditure)

Learning outcomes	Assessment criteria		Unit amplification
	1.5	Explain the importance of consulting with colleagues and other stakeholders during the development of the proposals and how to do this effectively.	<ul style="list-style-type: none"> □ Importance of consulting with colleagues and other stakeholders □ timing of marketing events, economic factors, additional support needed, venue problems(local disputes), artists continued popularity
	1.6	Explain how to develop measures and methods for monitoring and evaluating performance against the advertising strategy.	<ul style="list-style-type: none"> □ Developing measures and methods for Monitoring and evaluating performance: research, event plan action points, issues, communication with other bodies and groups, ticket sale reports, competitor analysis

Learning outcomes	Assessment criteria	Unit amplification
<p>2 Understand advertising and marketing in relation to the sector and particular organisation</p>	<p>2.1 Describe the market in which the organisation works, its products/services and two key market developments in the organisation's sector</p>	<ul style="list-style-type: none"> □ The market: music events, sporting events, festivals, concerts □ Services: live Bands, retail, catering, sales □ Market developments: Digital events, community Arts, live exhibitions
	<p>2.2 Describe the organisation's advertising objectives and strategy, and their fit within its overall marketing strategy</p>	<ul style="list-style-type: none"> □ Objectives: target audience, sales maximisation marketing budget limits, limitations on the type of promotions, free advertising, local and national press releases Strategy:
	<p>2.3 Describe the organisation's target customer base (both internal and external) in terms of:</p> <ul style="list-style-type: none"> ● media habits ● needs and expectations 	<ul style="list-style-type: none"> □ Target audiences: type of customer by age, gender, lifestyle, locality □ Media habits: type of products consumed by the target audience, when and how they buy them
	<p>2.4 List at least two actual and potential competitors to the organisation, and describe the key features of their advertising strategies</p>	<ul style="list-style-type: none"> □ Competitors: local competition, national competition, like for like organisations, similar organisations, new organisations, identical and substitute products
	<p>2.5 Describe the regulatory, ethical and code of practice requirements and their impact upon advertising practice in the organisation's sector</p>	<ul style="list-style-type: none"> □ Code of practice relevant to the industry, advertising standards; organisational ethical codes of conduct □ Legal, data protection, legislation affecting advertising □ Impact upon advertising practice in the organisation's sector: restrictions, legal, decent, honest and truthful, ethical, fair, accessible

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1 Understand the role of advertising and marketing

This could be delivered through a tutor presentation or by learners working in groups to classify the different ways an organisation is marketed within the creative live event industries. Learners could use the internet to source information about the different ways of marketing associated with the creative and cultural sector. Classroom discussions could be used to share views on various marketing campaigns, and how to monitor and evaluate the marketing. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Learners could use industry websites to locate information on marketing strategies. Visiting speakers who work in this specialist sector of the live events market would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 2: Understand advertising and marketing in relation to the sector and particular organisation

This learning outcome follows on from the previous outcome and asks the learners to look at their own sector. Learners will need to research their own organisations marketing strategies, and to look at various aspects of their own promotions and compare them with other organisations marketing campaigns. Learners should use the internet and trade magazines to obtain the information needed, and classroom discussions could be used to share views. Visiting speakers who work in this specialist sector of the live events market would be a useful resource in aiding learners to meet this learning outcome.

Assessment

Learners will need to carry out research, but will also need to spend some time in the marketing and advertising department of this sector. Evidence may be in the form of a written report or presentation. A witness testimony from a member of the marketing and advertising department of their organisations will provide supplementary evidence. Professional discussion can be used to ensure learners have a good understanding of the unit criteria.

Suggested resources

Websites

www.artscouncil.org.uk

Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.

ccskills.org.uk

The Sector Skills Council for Creative and Cultural.

www.museumsassociation.org/home

Museum Association: a membership organisation providing information on museums, galleries and heritage.

Unit 9: Understand the production of promotional material for the music industry

Unit reference number: J/601/6679

QCF level: 3

Credit value: 3

Guided learning hours: 18

Unit aim

This unit covers the knowledge and understanding relating to the roles, responsibilities and processes for producing promotional materials within the music industry; the key organisations that are involved in producing promotional materials; and the legislative requirements for producing promotional materials.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes	Assessment criteria		Unit amplification
1 Understand roles and responsibilities in the process of producing promotional materials.	1.1	Describe how a promotions department operates.	<ul style="list-style-type: none"> □ Music sector promotions department: airtime, selling, using promotional tools (radio, music press, artist promotions, mailing lists, material)
	1.2	Explain the integration of Radio and TV with on-line promotional opportunities.	<ul style="list-style-type: none"> □ Integration of Radio and TV with on-line promotional opportunities: combining and coordinating radio, TV and web-based promotions into one campaign □ Reasons: achieve objectives; branding, corporate image, customer perceptions, customer loyalty
	1.3	Identify the key organisations that are involved in producing promotional materials and describe their roles and responsibilities in the process.	<ul style="list-style-type: none"> □ Key organisations: radio channels, TV channels and production companies, music press, digital companies, merchandising companies. □ Roles and responsibilities: planning, purchasing, producing materials, distribution, administration

Learning outcomes	Assessment criteria	Unit amplification
<p>2 Understand principles and processes for producing promotional materials</p>	<p>2.1 Identify the basic principles of good design for promotional materials.</p>	<ul style="list-style-type: none"> □ Basic principles of good design: □ balance; layout, use of white space, combination of different design elements □ level and variety of contrast; different sized elements, images and typefaces, colours, tints □ movement and direction □ alignment; placing of content, visual impact □ repetition; colours, shapes, textures, fonts, line thickness □ proximity; grouping related item □ economy and space; 'less is more' principle, white space □ branding: logo, consistent colours and identifiable imagery
	<p>2.2 Explain the purpose and content of a design brief for promotional materials, including:</p> <ul style="list-style-type: none"> • Format. • Content. • Level of detail required. 	<ul style="list-style-type: none"> □ Purpose of design brief: communicate expectations to the design team; description of the project; identify the objectives and main priorities of the project □ Format: layout — title, business name, contact details, completion date, review date, budget, product/service, objectives, target audience, regulatory issues, scope, purpose, project plan, evaluation □ Content: the mission, the objectives, performance requirements and measures, priorities, management decisions and responsibilities, timeframe, who is expected to respond □ Level of detail: depends on type of project and client

Learning outcomes	Assessment criteria	Unit amplification
2.3	<p>Describe how the content of promotional materials should be presented, written and sequenced for different types of consumers, in order to maximise:</p> <ul style="list-style-type: none"> ● Impact. ● Interest. ● Visibility. 	<ul style="list-style-type: none"> □ Consumers: target audience; type of customer by age, gender, lifestyle, locality □ Presentation: clear, colourful, eye catching, novel, □ Maximisation of impact: creates attention, interest, desire, conviction, action (AIDCA) □ Interest: use of special offers, giveaways, innovative materials □ Visibility: use of coordinated branding on promotional materials
2.4	<p>Identify the main sources of information during the production process and explain how confidential information should be handled.</p>	<ul style="list-style-type: none"> □ Sources: organisation's documents, briefing plans, communication lists, controlled information release (organisations procedures and policies) □ Handling confidential information: secure electronic and manual storage, retention and disposal of confidential materials, disclosure and sharing of information
2.5	<p>Explain what is meant by 'an honest interpretation of the subject matter'.</p>	<ul style="list-style-type: none"> □ Honest interpretation: organisations policies and procedures (Professional, truthful, factual, Up to date information)
2.6	<p>Identify the different types of location sites that can be used for promotional materials and the suitability of each for different types of consumers.</p>	<ul style="list-style-type: none"> □ Locations: retail outlets, music outlets, concerts, online, festivals □ Types of customers: age, lifestyle
2.7	<p>Describe the factors that can affect the production of promotional materials and how these should be handled.</p>	<ul style="list-style-type: none"> □ Factors: type of promotional item, cost, budget, type of audience, objective of the promotion, timescale □ Handling production of promotional materials: project planning, budgeting, contingencies

Learning outcomes		Assessment criteria	Unit amplification
3	Understand the legislative requirements for producing promotional materials.		
		3.1 Describe the legislative requirements that must be adhered to in producing promotional materials.	<ul style="list-style-type: none"> □ Legal aspects: legislation affecting advertising and promotions, correct information, actual facts promoted, no misleading information, product safety legislation, copyright laws

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1: Understand roles and responsibilities in the process of producing promotional materials. This could be delivered through a tutor presentation or by learners working in groups to clarify how the use of promotional material works in the music industry. Learners could use the internet to source information about the types of promotional material available in this sector. Classroom discussions could be used to give a clearer picture of this fast moving form of marketing. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Learners could use industry websites to locate information on promotional campaigns. Visiting speakers who work in the marketing and promotional departments would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 2: Understand principles and processes for producing promotional materials. This could be delivered through a tutor presentation or by learners working in groups to clarify what is a good design brief in the music industry. Classroom discussion on good and bad designs is very useful for this unit. Visiting speakers who work in the marketing and promotional departments would be a useful resource in aiding learners to meet this learning outcome. Visiting speakers who work in the marketing and promotional departments would be a useful resource in aiding learners to meet this learning outcome. Learners could visit marketing companies and marketing sites to help them collect the evidence they need for this unit. Tutors may wish to create marketing assignments to assist learners in creating their promotional ideas.

Learning Outcome 3: Understand the legislative requirements for producing promotional materials. The tutor will need to teach the legislative requirements needed when producing promotional material. Learners could use the internet to source the information required. Visiting speakers who work on the legal side of the industry would be a useful resource in aiding learners to meet this learning outcome.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: a presentation on the various types of promotional material used in the music industry and how this is changing. A programme of suggested marketing assignments can be used as evidence. A report including research notes can be submitted on the whole unit, and a witness testimony would enhance this evidence.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.

Unit 10: Understand how artist agreements and contracts work

Unit reference number: A/601/6663

QCF level: 3

Credit value: 3

Guided learning hours: 18

Unit aim

This unit relates to the knowledge required in order to provide support to colleagues in drawing up and maintaining contracts, including all aspects of how legal documentation, such as agreements and contracts are used within the music industry.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the principles and processes relating to artist agreements and contracts.	1.1 Explain the terms 'commercial', 'contracts' and 'copyright'.	<ul style="list-style-type: none"> □ Commercial: wider audience material (commercial promotions), live music, songs, downloads □ Contracts: legally binding agreements to use artists' materials in return for royalty payments. □ Copyright: protection for musical artists against copying of songs, music, lyrics; covers music, artistic works, sound recordings, films, broadcasts, public performances
		1.2 Explain the purpose that contracts serve within the music industry.	<ul style="list-style-type: none"> □ Purposes: artist income protection, artist identity, marketing and promotion (minimum and maximum levels of promotion expected), contract lengths, contract details (number of shows, recordings, public appearances)
		1.3 Explain how complex contracts are drafted and constructed.	<ul style="list-style-type: none"> □ Details of contracts: contract dates (commencement and expiry), restrictions (involvement on both sides), fees and commission involved, territory, term, rights granted, release commitment, key man provision, advances, recording costs, royalties, promotion, artist warranties, □ Personnel involved: lawyers, management, artists, venues, agencies
		1.4 Identify the type of information that should be contained within a contract.	<ul style="list-style-type: none"> □ Contract information: dates, fees, commissions, restrictions, minimum recordings, minimum performances and appearances, royalties

Learning outcomes	Assessment criteria	Unit amplification
	<p>1.5 Explain precedent, the purpose of standard form agreements, and the circumstances in which these should be used</p>	<ul style="list-style-type: none"> □ Precedent: setting out an agreement based on a legal principle or rule based on cases with similar issues or facts □ Standard form agreements: professional agreements based on a set agreed format in line with organisational procedures and industry standards; use common phrases, uniform definitions, consistent logical format; includes all terms and conditions are a form contract that covers most of the typical situations □ Purpose: define the relationship between the artist and manager, and to outline the roles of each party in that relationship; to avoid disagreements □ Circumstances in which standard form agreements should be used: where the terms of the agreement are similar to others; to save time where the terms of the agreement are straightforward; to reduce the legal work required and the time spent on negotiation; trade associations e.g. Musicians' Union and similar entities often effect standardisation of this kind through a collective agreement
2	<p>Understand issues relating to compliance.</p> <p>2.1 Explain the 'All-in-Fee Agreement'.</p> <p>2.2 Identify and explain the 'Music Industry Legal Directives'.</p>	<ul style="list-style-type: none"> □ All in fee details: no additional fees above the agreed contract, no additional expenses, fixed fees (includes all recording, writing and performances) □ Legal directives: European music law, digital music legal directives, downloads, copyright laws

Learning outcomes	Assessment criteria	Unit amplification
	2.3 Describe the circumstances in which issues of compliance may emerge in relation to the: <ul style="list-style-type: none"> • The All-in-Fee Agreement. • Music Industry Legal Directives. 	<ul style="list-style-type: none"> □ Compliances: production company must pay a flat fee to artist; artists must pay all costs incurred; breach of contract; breach of copyright
3	3.1 Understand issues relating to piracy and parallel imports. 3.2 Explain how to recognise alleged cases of piracy and/or parallel imports, and how and when these should be reported to the BPI Audit Piracy Unit.	<ul style="list-style-type: none"> □ British Phonographic Industry Audit Piracy unit's purpose, role and responsibilities: protection from illegal downloading, court action, working collaboratively with copyright distributors, music companies and artists □ Piracy signs: poor quality recordings, poor quality packaging, very low cost □ Parallel imports: original goods imported into another country without authorisation of the producer; usually sold at a significantly cheaper price □ Reporting procedures: BPI policies and procedures for suspicious cases

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1 Understand the principles and processes relating to artist agreements and contracts

The tutor can give an overview of different styles of contracts and agreements in the creative industries. Learners should research on the internet the purpose of a contract, and the various ways to draft and construct a contract. To gain a greater insight, tutors can set learners an assignment to create a contract. The contract can then be discussed in groups in the classroom. Visiting speakers who work in the music industry involved in contracts, would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 2: Understand issues relating to compliance

Learners must know about legal directive issues in the creative and cultural industry. Legal directive issues can be explored through the internet, which will provide a basis for classroom discussion. Visiting specialist speakers who work in the creative and cultural industry legal sections, would be a useful resource in aiding learners to meet this learning outcome

Learning Outcome 3: Understand issues relating to piracy and parallel import

The tutor can give an overview of the different problems with digital piracy in the creative industries. Learners should research digital piracy and the purpose of the BPI Audit Piracy unit on the internet. This will form a basis for group discussion for their Visiting specialist speakers who work in the creative and cultural industry legal sections, would be a useful resource in aiding learners to meet this learning outcome

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: a presentation on the drafting and construction of contracts and agreements. A report on digital piracy in the industry and the role of the BPI. Assignments created and marked by the assessor can be used to draw up mock agreements and contracts. If learners are working in contract departments, observations and witness testimony's can also be used.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.
www.bpi.co.uk	The British Recorded Music Industry trade body. BPI's Research Department tracks and analyses industry trends and results. It also offers a range of informative publications.

Unit 11: Understand record label identity and branding

Unit reference number: J/601/6682

QCF level: 3

Credit value: 3

Guided learning hours: 18

Unit aim

This unit is about supporting and understanding brand identity and characteristics for a label's products and services. These can include a defined range of products and services, or a particular product or service.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand brand identity.	1.1 Explain the importance of brand identity and its role in marketing products and services.	<ul style="list-style-type: none"> □ Brand identity: how the market perceives a product or brand (colours, design, logo, name, slogan). □ Products and services: Artists, Organisations (Unique characteristics), CD's, events, radio and TV, (branding shows with music), music scores (signature tunes) □ Importance and role in marketing: represents company values, services, ideas and personality; customer loyalty, competitive edge, brand awareness, brand preference, high credibility, good financial returns.
		1.2 Explain the importance of having a brand strategy for an organisation's products and services and the factors this needs to consider.	<ul style="list-style-type: none"> □ Importance of having a brand strategy: delivers the message clearly, gains customer trust, motivates buyer, repeat business (customer loyalty) □ Products and services: Artists, Organisations , CD's, events, radio and TV, music scores (signature tunes) □ Factors: Unique characteristics, culture, personality, presentation, audiences, locality
		1.3 Describe at least 3 issues to consider when: <ul style="list-style-type: none"> • Deciding whether or not to brand products and services. • Selecting a brand name. 	<ul style="list-style-type: none"> □ Issues: size of market, future developments, trends, competition □ Brand name: Organisation's profile, trends, target audiences, locality, market competitors, other similar brand names

Learning outcomes	Assessment criteria	Unit amplification
2	<p>Understand brand characteristics.</p> <p>2.1 Describe the main characteristics that make up a brand and the importance of ensuring that these are integrated.</p> <p>2.2 Describe the types of product and service attributes that need to be considered when determining the possible benefits to consumers of products and services, including:</p> <ul style="list-style-type: none"> • Quality. • Features. • Style. • Design. 	<ul style="list-style-type: none"> □ Brand characteristics: colours, design, logo, name, slogan, image. □ Importance of integrating brand characteristics: strong brand image, recognised label, differentiate from other labels, customer perception, loyalty.
3	<p>3.1 Analyse current and emerging trends in the record industry and sector.</p> <p>3.2 Describe at least 3 factors that affect consumer decision making within the record industry and sector.</p>	<ul style="list-style-type: none"> □ Quality: high quality (consider costs, demand, production) □ features: important features (stand out characteristic), special artist or CD, why the customer needs the product or service (trends, popularity) □ Style: style of music (classical, pop, country, rock etc.) □ Design: CD cover design, promotional material, <ul style="list-style-type: none"> □ Trends: music technology (smartphones, downloads, file sharing, streaming, music websites, music apps) social media, smart TV/on demand, online purchase □ Artists: new bands and acts, re unions, all-time greats, festivals, arena tours □ Future developments: growth of specialised labels, concert streaming, decline of radio, licensing of music for online use □ Factors: costs (cost of CD's/downloads and event prices), popularity of artists, style of music, availability (downloads/streaming/file sharing), quality

Learning outcomes	Assessment criteria		Unit amplification
4	4.1	<p>Understand legal, regulatory and ethical requirements affecting the marketing of the organisation's products and services in the sector.</p> <p>Explain the legal, regulatory and ethical requirements affecting the marketing of products and services in the sector.</p>	<ul style="list-style-type: none"> □ Legal: copyright, artists' contracts, use of certain material, digital piracy, parallel imports, licensing, royalties □ Ethical: social, religion, culture, age, sex discrimination

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1: Understand brand identity

This could be delivered through a tutor presentation or by learners working as a group to discuss the importance of brand identity. Learners could use the internet to source information about the types of branding in the music industry. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Learners could use industry websites to locate information on various branding techniques. Visiting speakers who work in the music marketing industry would be a useful resource in aiding learners to meet this learning outcome.

Learning Outcome 2: Understand brand characteristics

This unit can be taught holistically as this outcome follows on from learning outcome one. All the above teaching methods could also be used for this learning outcome.

Learning Outcome 3: Understand industry trends and consumer decision making

This could be delivered through a tutor presentation or by learners working as a group to discuss the trends in the music industry. Learners could use the internet to source information about the types of trends in the music industry. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Learners could use industry websites to locate information on future developments. Visiting speakers who work in the music marketing industry would be a useful resource in aiding learners to meet this learning outcome. Learners would benefit from visiting music marketing companies if this can be arranged. Assignments can also be set look at music trends.

Learning Outcome 4 Understand legal, regulatory and ethical requirements affecting the marketing of the organisation's products and services in the sector.

The learner will need to know the legal and ethical factors associated with marketing products and services in the music industry. Learners should research, using the internet, for a variety of issues listed in these criteria. One of the main discussion will be about digital piracy in the industry. Visiting speakers who work in the music marketing industry would be a useful resource in aiding learners to meet this learning outcome.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: a presentation on the branding and marketing trends in the music industry; a report on all the issues in this unit including the legal and ethical issues in music marketing. A programme of suggested assignments may be adapted to meet local needs or the needs of particular groups of learners. Assessors should ensure that learners demonstrate a clear understanding of the music industries labelling and branding.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.
www.bpi.co.uk	The British Recorded Music Industry trade body. BPI's Research Department tracks and analyses industry trends and results. It also offers a range of informative publications.

Unit 12: Understanding the impact of emerging technology on the music industry

Unit reference number: J/505/1308

QCF level: 3

Credit value: 2

Guided learning hours: 12

Unit aim

This unit is about understanding emerging music technologies and recognising the impact of such technologies on the music industry generally. Learners will be provided with an understanding of the legal requirements of music downloading and online sales.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes	Assessment criteria	Unit amplification
1	<p>Understand different types of emerging music technology.</p> <p>1.1 Explain how and where to find information about the different types of emerging music technology.</p> <p>1.2 Evaluate critically the different types of emerging music technology.</p>	<ul style="list-style-type: none"> □ Emerging music technology: downloading, streaming, social media, online sales, on demand, the cloud, music apps □ Sources: digital information sites, websites, music press and magazines, music conferences □ Critique: pros and cons of each type, technical issues, cost effectiveness, copyright and piracy issues
2	<p>Understand the impact of emerging music technology on the music industry.</p> <p>2.1 Explain the impact of different types of emerging music technology on the music industry in terms of:</p> <ul style="list-style-type: none"> ● Cost implications. ● Benefits to business. ● Benefits to the consumer. ● Potential risks. 	<ul style="list-style-type: none"> □ Cost implications: income and expenditure, digital and downloads, piracy □ Benefits to business: distribution methods, decrease in employees, increase sales □ Benefits to consumers: wider choice of music, availability, reduction in costs, flexibility □ Potential risks: piracy, loss of income to various parties (artists, distribution organisations)
3	<p>Understand the legal requirements of music downloading and online sales.</p> <p>3.1 Explain the current legal requirements relating to:</p> <ul style="list-style-type: none"> ● Music downloading. ● On-line sales. 	<ul style="list-style-type: none"> □ Music downloading: must be paid for, copyright laws, piracy laws □ On-line sales: consumer protection, e-commerce and distance selling regulations, electronic signature regulations,

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1 Understand different types of music technology

This could be delivered through a tutor presentation or by learners working in groups to classify and evaluate the emerging music technology. Learners could use the internet to source information about the types of music technology available now and planned. Classroom discussions could be used to describe all the technology available. Information could be gleaned from industry magazines and the media to use as a basis for discussion. Tutors can set assignments to allow the learner to research the subject and gain the evidence they need. It is recommended to obtain as much information as possible on the new technology in various parts of the industry.

Learning Outcome 2: Understand the impact of emerging music technology on the music industry

This learning outcome follows on from the previous one so similar methods of delivery can be used. The learner needs to focus on emerging technology, and to take into consideration the costs, and the benefits to business and the customer. Any research and discussion also needs to look at the threats that come from new technology, including digital piracy.

Learning Outcome 3: Understand the legal requirements of music downloading and on line sales

The learner needs to know about the legal requirements of music downloading and on line sales. Information could be gleaned from industry magazines and the internet to use as a basis for discussion.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Evidence for this unit may be presented in a variety of forms including the following suggestions: a presentation on existing and emerging technology in the music industry; a report evidenced by research notes. A programme of assignments may be adapted to meet local needs or the needs of particular groups of learners. Assessors should ensure that learners demonstrate a clear understanding of the impact of emerging technology on the music industry and the threats that may evolve. Assignment notes and results can be marked as evidence with professional discussion used to fill any gaps in the evidence.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.

Unit 13: Principles of planning costumes for a production

Unit reference number: Y/503/0270

QCF level: 3

Credit value: 4

Guided learning hours: 21

Unit aim

This unit is aimed at learners who wish to learn about how to plan the costume requirements of a production. Learners will gain knowledge of the health and safety considerations of making costumes that must be borne in mind planning the costumes to ensure that no regulations are breached in the production of costumes. It also covers the type of information that learners will need to know about performers when planning costumes, and how to plan the making of costumes for a production.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know health and safety considerations that affect costume planning.	1.1	Identify the current regulations and health and safety considerations that must be followed when making costumes.	<ul style="list-style-type: none"> □ Current regulations and health and safety considerations: Health and safety at work Act □ Health and safety considerations: sewing machines, steaming devices, hot irons, sprays, tools (operating and maintenance); large costumes, (effects of different materials on the body, possible allergic reactions, and the need for body cooling).
		1.2	Describe how to ensure planned costume production will not breach regulations and health and safety considerations.	<ul style="list-style-type: none"> □ Ensuring planned costume production, does not breach regulations and health and safety: organisations' health and safety procedures: communication with health and safety officers, training.
2	Know the performer information required to plan costumes.	2.1	Identify the type of information needed about the performer.	<ul style="list-style-type: none"> □ Types of information: sizes (body size, head size, shoe size), disabilities, directors requirements, role
		2.2	Explain how to obtain relevant information on the performer.	<ul style="list-style-type: none"> □ Information on the performer: directors notes, costume lists, scripts, HR information, character role, □ How to obtain: director, script writer, HR, production designer, hair and make-up team

Learning outcomes	Assessment criteria	Unit amplification
3	2.3	Explain how to take measurements.
	2.4	Describe types of alterations that may be needed.
	2.5	Describe the type of information that may be confidential.
	2.6	Describe how to handle confidential information.
	3.1	Explain how to estimate what time and resources may be needed to get costumes ready for performances.
	3.2	Describe what communication needs to take place with other departments when planning costumes.
	3.3	Describe what activities need to be co-ordinated with other departments when planning costumes.
		<ul style="list-style-type: none"> □ Taking measurements: measure twice, cut once, electronic, hand tapes, shoe size measures,. hat size measures, recording documents □ Alterations: incorrect fit (shorten, lengthen, increase, decrease), dyeing of fabrics, adding detail (trims, buttons) □ Confidential information: sizes, performers role, personal details □ Handling confidential information: secure handling and storage; no gossip with other team members □ Estimating time and resources needed to get costumes ready for performances: resources; running sheets, costume notes, script, costume planning schedule, budgets, time management □ Communication with other departments: directors, stage manager, senior costume and wardrobe manager, performers, suppliers, transport company □ Activities to be coordinated with other departments: supply chain, transport, budgets, dates, rehearsal and show dates, performer availability □ Departments: Purchasing, Transport, Finance, HR, Wardrobe, Director, Producer.

Learning outcomes	Assessment criteria	Unit amplification
	<p>3.4 Explain how to use production information to create a long term schedule for costume production.</p>	<ul style="list-style-type: none"> <li data-bbox="288 192 496 1178">□ Production information: design and resource constraints, budget, outsourcing (skills, availability), performer information, deadlines, current regulations, environmental and health and safety considerations, materials available, length of show run (new or altered costumes needed), change of cast (different costume size may be needed), amendments to the production(change of costumes), <li data-bbox="504 192 788 1178">□ Creating long term schedule for costume production: confirm the requirements and constraints for costume construction, collect all the necessary information about the costumes needed, plan how to make the best of resources available, in consultation with other members of the team, take into account which costumes will be made in house or by outside specialists or sourced readymade;. make best and safe use of the resources available, liaise effectively with the designer and relevant members of the production team; make sure that plans and any changes are recorded in an appropriate format.

Information for tutors

Delivery

This unit should be delivered by a well-qualified and suitably experienced tutor.

Learning Outcome 1: Know health and safety considerations that affect costume planning

This area can be introduced through tutor input and learner research into the health and safety requirements needed in the costume industry, Visiting speakers who work in the costume industry would be a useful resource in aiding learners to meet this learning outcome. To gain a more in-depth knowledge, the learner should visit theatres or costume suppliers to witness the settings and restrictions in a costume department themselves.

Learning Outcome 2: Know the performer information required to plan costumes

This could be delivered through a tutor presentation or by learners, working in groups to clarify what information is required for planning costumes for a production. Learners could use the internet to source information about the different types of costumes that may be required. Information could be gleaned from industry magazines and the media to use as a basis for discussion in classroom groups. Visiting speakers who work in the costume departments would be a useful resource in aiding learners to meet this learning outcome. To gain a more in-depth knowledge, the learner should visit theatres or costume suppliers to witness the costume department themselves.

Learning Outcome 3; Know costume planning methods

Tutors could set costume assignments to create the evidence for this outcome. Good communication skills need to be taught, and how to liaise with other departments to obtain information to plan costumes. Visiting speakers who work in the costume departments would be a useful resource in aiding learners to meet this learning outcome. To gain a more in-depth knowledge, the learner should visit theatres or costume suppliers to witness the costume department themselves.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

The learner can produce a report on the various aspects of planning costumes for a production. Assignments can be set and marked for the planning of costumes for a production. Observations of the learner assisting in a theatre or costume suppliers can be used together with witness testimonies from work place sites.

Suggested resources

Websites

www.artscouncil.org.uk	Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.
ccskills.org.uk	The Sector Skills Council for Creative and Cultural.

Unit 14: Awareness of health and safety in the creative and cultural sector

Unit reference number: J/601/6715

QCF level: 2

Credit value: 2

Guided learning hours: 14

Unit aim

This unit will give the learner an understanding and awareness of how to comply with relevant health and safety procedures and regulations in the Creative and Cultural sector.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria	Unit amplification
1	Understand the relevant health and safety regulations in the creative and cultural sector	1.1 Identify key elements of health and safety regulations, relevant to working in the creative and cultural sector	<ul style="list-style-type: none"> □ Key elements: regulations (RIDDOR, HASAW, COSHH, EWR)
		1.2 Outline safe working practices in the creative and cultural sector	<ul style="list-style-type: none"> □ Safe working practices: policies, procedures, disaster plans, risk assessments relating to staff safety, customer/visitor safety, fire evacuation
		1.3 Identify the main employer responsibilities under the Health and Safety at Work Act	<ul style="list-style-type: none"> □ Main employer responsibilities under the Health and Safety at Work Act: to produce policies and procedures, communicate policies and procedures, review all incidents, training, insurance, complete risk assessments
2	Be able to comply with relevant health and safety procedures	2.1 Outline the differences between hazards and risks	<ul style="list-style-type: none"> □ Hazards: potential to cause harm; safety hazards, physical hazards, chemical hazards □ Risks: the chance, high or low, that any hazard will actually cause somebody harm
		2.2 Carry out a risk assessment	<ul style="list-style-type: none"> □ Risk assessment: identify hazards, who might be harmed and how; evaluate the risks, decide on precautions; record findings; implementation; review assessment and update if necessary
		2.3 Report identified hazards and risks to the appropriate parties	<ul style="list-style-type: none"> □ Reporting system: reporting procedures, incident forms, accident book

Information for tutors

Delivery

A well-qualified and suitably experienced tutor should deliver this unit.

Learning outcome 1: Understand the relevant health and safety regulations in the creative and cultural sector. A combination of taught input, learner research and class discussions will enable the learner to identify key elements of health and safety regulations and safe working practices relevant to working in the creative and cultural sector. The use of case studies obtained from professional magazines and input from visiting speakers will enable learners to gain a fuller understanding of the main employer responsibilities under the Health and Safety at Work Act.

Learning outcome 2: Be able to comply with relevant health and safety procedures. The tutor could outline the theoretical background, defining what hazards are and examining a range of working environments, for example theatre, museum, office. A range of videos/DVDs, pictures and case studies are available on the subject of hazards in the workplace, which would enhance the learning process. The Health and Safety Executive website is a good source of resources and many organisations now have their health and safety policies on the internet. Learners could be encouraged to look for hazards in their own workplace (taking photographs of potential hazards if possible) and to identify the risks that arise from these hazards. This can heighten their awareness of hazards in preparation for group discussions. However, learners should carry out an actual risk assessment for an activity that forms part of their job role in the workplace or for a practical activity, they complete as part of the course.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Learners could complete an assignment, which outlines the health and safety regulations relevant to their workplace or college. This could be a verbal presentation to the tutor and the rest of the class or in a written format. Notes taken in response to case study material or from a visiting speaker's presentation could be used as supplementary evidence. Oral questioning by the tutor could be used to test knowledge and understanding.

Learners could produce a written audit, supplemented by photographs, of health and safety hazards and risks around their workplace or college. Finally they could complete a risk assessment for a specified task, such producing a costume for a production or other task related to their specific area of study. The written report would provide the evidence of the risk assessment.

Suggested resources

Books

Health and Safety Executive – *Essentials of Health and Safety at Work* (HSE Books, 1994) ISBN 9780717607167

Health and Safety Executive – *Five Steps to Risk Assessment* (HSE Books, 1998) ISBN 9780717615650

Hughes P – *Introduction to Health and Safety at Work* (Butterworth-Heinemann, 2011) ISBN 9780080970707

Journal

RoSPA: *Occupational Safety & Health* (OS&H)

Websites

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| www.hse.gov.uk | The government's Health and Safety Executive: provides information on health and safety rights and responsibilities |
| www.rospa.com | Royal Society for the Prevention of Accidents: provides a wide range of accident prevention topics. |

Unit 15: Principles of technical and production developments in the live arts

Unit reference number: A/503/0259

QCF level: 2

Credit value: 3

Guided learning hours: 18

Unit aim

This unit aims to develop learners' knowledge and understanding of current and historical trends and developments in the live arts, including the materials, media, technology, equipment and processes used within the live arts.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know current and historical trends in the live arts	1.1	Describe the culture and history of technical and production developments in the live arts	<ul style="list-style-type: none"> □ Culture and history of technical and production developments in the live arts: performance, production, costume and wardrobe, technical theatre, stage management, set construction, sound, lighting
		1.2	Describe the changing impact of cultural and historical trends on contemporary practice	<ul style="list-style-type: none"> □ Cultural and historical trends: changes in changes in social demographics, (population growth, ageing population, migration); increasing education levels; growth of large corporate organisations; growth of growth of large corporate organisations; growth of commercial recorded and broadcast performing arts industry; advances in technology □ Impact: effects on the business, effects on the customer, economic issues
		1.3	Identify current trends and opportunities in the sector	<ul style="list-style-type: none"> □ Current trends and opportunities: wider audiences, different venues, emerging technology

Learning outcomes	Assessment criteria	Unit amplification
2 Know materials and technology used in the live arts	2.1 Describe the properties and availability of materials used in the live arts 2.2 Describe the capabilities and features of existing technologies used in the live arts 2.3 Describe the benefits and limitations of existing technologies used in the live arts	<ul style="list-style-type: none"> □ Properties and availability of materials: technical items, set construction, costume and wardrobe □ Capabilities and features of existing technologies: limits of technology, lighting, sound, future developments □ Benefits and limitations of existing technologies: limits of technology, lighting, sound, future developments
3 Know how materials, technology and processes are used in the live arts	3.1 Describe how materials and technology are used in the live arts 3.2 Describe the limitations of different materials, technology and processes used in the live arts 3.3 Describe the effects of combining different materials, technologies and processes in the live arts	<ul style="list-style-type: none"> □ Materials and technology: technical items, set construction, costume and wardrobe, special effects, lighting, sound □ Limitations of different materials, technology and processes: technical items, set construction, costume and wardrobe, special effects, lighting, sound □ Effects of combining different materials, technologies and processes: technical items, set construction, costume and wardrobe, special effects, lighting, sound

Information for tutors

Delivery

Learning outcome 1: Know current and historical trends in the live arts. The tutor could involve learners in a discussion on what they know about the development of the live arts, drawing on the learners' experiences from different pathways. Whilst tutor input can give historical timelines on general trends in the live arts, it will be more valuable for learners to research into their own particular areas of specialism using creative and cultural websites. They can then share this information with the rest of the group through a presentation and thus enhance the knowledge of the whole group.

Learning outcome 2: Know materials and technology used in the live arts. The tutor could show learners a range of materials and if possible demonstrate any current technology. Learners should be given the opportunity to examine the materials and use the technology themselves. A visit to a theatre or similar setting would bring this area to life and help to underpin learners' understanding of this area.

Learning outcome 3: Know how materials, technology and processes are used in the live arts. As this learning outcome is closely related to learning outcome 2, they could be taught together using the same delivery methods.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

An effective way to produce evidence for this unit is to do a visual presentation, demonstrating materials and technology, and possibly providing a report on the effects of combining different materials and the limitations of materials, technology and processes used in the live arts. A record of a discussion between the learner and the tutor about materials and technology would be valid supplementary evidence.

Suggested resources

Websites

www.artscouncil.org.uk

Arts Council, England: Advice and guidance on different types of arts activity; education and learning, audience development, diversity and resource development.

ccskills.org.uk

The Sector Skills Council for Creative and Cultural.

www.creative-choices.co.uk/develop-your-career/unit/cpd2a

Information on career skills for keeping up to date in technical developments.

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel: www.edexcel.com/contactus
- BTEC: www.edexcel.com/btec/Pages/Contactus
- Pearson Work Based Learning and Colleges: www.edexcel.com/about.wbl/Pages/Contact-us
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandcolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *UK Quality Vocational Assurance Handbook* (Pearson).

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are available on our website at www.edexcel.com/btec/delivering-BTEC/quality/Pages

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/Pages

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website at: www.edexcel.com/resources/publications/Pages

14 Professional development and training

Pearson 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 learner-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 is on our website at: www.edexcel.com/resources/Training/Pages. You can request customised training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

BTEC training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We have designed our new network events programme to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region. Sign up to the training you need at: www.edexcel.com/btec/delivering-BTEC/training/Pages

Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments. If you would like your Curriculum Development Manager to contact you, please get in touch with your regional office on: 0844 463 2535.

Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert – at: www.edexcel.com/Aboutus/contact-us/Pages
- **Ask the Expert:** submit your question online to our Ask the Expert online service www.edexcel.com/aboutus/contact-us/ask-expert/Pages and we will make sure your query is handled by a subject specialist.

Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 3 Certificate in Principles of the Creative and Cultural Sector against the Creative and Cultural Skills SSC National Occupational Standards in Cultural Heritage, Community Arts, Live Events and Music Business and Skills CFA SSC National Occupational Standards in Business and Administration. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

- # indicates partial coverage of knowledge in the NOS unit
- A blank space indicates no coverage of the knowledge

NOS	Pearson BTEC Specialist units						
	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
CCS30	#						
CFAM&LAA2		#					
CA9			#				
CFAM&LFA5					#		
CCS1						#	
CFAM&LEA4							#

Pearson BTEC Specialist units		Unit 8	Unit 9	Unit 10	Unit 11	Unit 12	Unit 13	Unit 14	Unit 15
NOS									
CCSLE1	Support publicity activities for live events	#							
CCSMB1	Produce promotional material for the music business	#							
CCSMB13	Understand how artist agreements and contracts work			#					
CCSMB8	Support the identity, brand and characteristics of a record label				#				
CCSMB17	Contribute to assessing the impact of emerging technology for the music business					#			
CCSWM7	Create patterns for costumes						#		
HSS1	Make sure your own actions reduce risks to health and safety							#	
CCSTP2	Keep up to date with technical and production developments in the live arts								

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