



Handbook

OMD5 – VTCT (Skillsfirst) Level 5 Diploma in
Operational and Departmental Management (RQF)

603/2750/9

Version 2

About Skillsfirst

VTCT is a market-leading Awarding, Assessment and End-point Assessment (EPA) Organisation offering vocational and technical qualifications in a range of 'services to people' sectors.

The VTCT group of companies are comprised of three innovative awarding brands: VTCT, ITEC and Skillsfirst. Together they have over 2,500 approved centres in over 40 countries across the world.

The qualifications suite offered by VTCT (Skillsfirst) spans a range of sectors including Childcare, Business Services, Health & Social Care, Recruitment and Social Media.

For more information visit us at www.vtct.org.uk and www.skillsfirst.co.uk, contact our dedicated Customer Support Team via email at customersupport@vtct.org.uk and customerservices@skillsfirst.co.uk or call 0121 270 5100

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1 Qualification at a glance

Qualification title	VTCT (Skillsfirst) Level 5 Diploma in Operational and Departmental Management (RQF)
Qualification number	603/2750/9
Product code	OMD5
Age range	There are age limits attached to learners undertaking this qualification as this qualification is not approved for learners under the age of 18.
Total Qualification Time (TQT)	603
Guided Learning (GL) hours	263
Assessment	To be awarded this qualification, learners must successfully achieve the following assessments: <ul style="list-style-type: none">• Portfolio of evidence• Skills-based assessment (if applicable)
Entry requirements	There are no formal entry requirements for learners undertaking this qualification; however, centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.
Support materials	Support materials can be found on the website (if applicable)

2 Qualification information

2.1 Qualification aim and design

This qualification has been designed to meet both employer and individual demand for learners to meet the knowledge and competences outlined in the Operations/Departmental Manager Apprenticeship standard. It is suitable for learners already within a management role who manage teams and/or projects, and achieve operational or departmental goals and objectives, as part of the delivery of the organisations strategy. It could also be suitable for those having the ability and the opportunity to demonstrate recognisable management and leadership skills who are accountable to a senior manager or business owner.

This qualification recognises the knowledge, skills and behaviours needed to create and deliver operational plans, manage projects, lead and manage teams, manage change, carry out financial and resource management, talent management, coaching and mentoring. It could also be used as CPD, utilising advanced learner loans (ALLs), for graduates and experienced Operations Managers, Regional Managers, Divisional Managers, Department Managers and specialist managers seeking a qualification to recognise their competence.

2.2 Progression opportunities

On completion of the Level 5 Diploma in Operational and Departmental Management (RQF), learners may progress into employment or onto higher-level qualifications.

2.3 Learner behaviours and attitudes

It is expected that learners undertaking this qualification exhibit the following attitudes and behaviours in the workplace:

Taking responsibility

- drive to achieve in all aspects of work
- demonstrates resilience and accountability
- determination when managing difficult situations
- seeks new opportunities

Inclusivity

- open, approachable, authentic and able to build trust with others
- seeks the views of others
- values diversity

Agility

- flexible to the needs of the organisation
- is creative, innovative and enterprising when seeking solutions to business needs
- positive and adaptable, responding well to feedback and need for change
- open to new ways of working

Professionalism

- sets an example, and is fair, consistent and impartial
- open and honest
- operates within organisational values

3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 5 Diploma in Operational and Departmental Management (RQF) learners must achieve all mandatory units.

The minimum TQT required to achieve this qualification is **603**.

Product code	Unit title	Level	GLH	Unit reference number
Mandatory units (Group M):				
OM1	Operational management	5	29	R/616/7251
OM2	Project management	5	18	Y/616/7252
OM3	Financial management	5	28	D/616/7253
OM4	Leading people	5	35	H/616/7254
OM5	Managing people	5	34	K/616/7255
OM6	Building relationships	5	28	M/616/7256
OM7	Communicating information	5	25	T/616/7257
OM8	Awareness of self and others in the workplace	5	21	A/616/7258
OM9	Management of self	5	17	F/616/7259
OM10	Decision making	5	28	T/616/7260

4 Centre requirements

4.1 Resources

Centres must possess the physical resources needed to support the delivery of the programme and the assessment of knowledge and skills, which should therefore be of industry standard. Where specific resources are required these have been indicated in individual units.

4.2 Occupational expertise of those who deliver, provide expert witness, assess performance, moderate and verify assessments

This handbook provides details of the assessment strategy, which centres will need to apply in order to assess and quality assure the Level 5 Diploma in Operational and Departmental Management (RQF) and includes the:

- occupational expertise of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

4.3 Occupational expertise of deliverers, assessors, and moderators/internal verifiers

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent to make assessment judgements about the broad use of computerised payroll and accounting techniques either in the workplace or in Realistic Working Environments (RWE); and occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training delivered
- have credible experience of providing training

Assessors and internal verifiers must hold the relevant and equivalent qualifications (such as D32, D33, A1, A2 or Level 3 TAQA for assessors and D34, V1 or Level 4 TAQA for internal verifiers), or be working towards an appropriate TAQA or equivalent qualification. Centre staff should have verifiable relevant experience and current knowledge of the occupational working area at, or above, the level they are assessing or verifying. This experience and knowledge must be of sufficient depth to be effective and reliable when judging learner competence or verifying assessment processes and decisions. This could be verified by:

- curriculum vitae and references
- possession of a relevant qualification
- records of continuous professional development
- corporate membership of a relevant professional institution

Centre staff may undertake more than one role, e.g. tutor and assessor or internal verifier, but must never internally verify their own assessments

4.4 Employer direct model

Where employers opt for an 'employer direct' model, the qualification requirements for assessors and internal verifiers may be waived.

The employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of Skillsfirst may choose between:

- achieving the appropriate approved qualifications for assessment/verification

or

- demonstrating that their (the employer's) training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by Skillsfirst as providing the equivalent level of rigour and robustness as achievement of the approved assessment/verification qualification

Each application to use the employer direct model will be considered on an individual organisation and qualification basis and agreed by the qualification regulators, including the sector skills council. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the standards in association with Skillsfirst.

4.5 Continuous professional development (CPD)

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD. Centres are also expected to support their assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Centres may have generic criteria and personnel specifications in addition to the above.

4.6 Total Qualification Time (TQT)

Each qualification has a Total Qualification Time (TQT) value based on the total number of hours learning required to achieve it. The TQT value reflects the number of supervised learning hours required to achieve the knowledge and assessment requirements, plus the length of time a learner would need to take to achieve the skills and capabilities to be deemed competent. All RQF qualifications are subject to an evaluation process to determine their fitness-for-purpose.

5 Assessment

5.1 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

5.2 Assessment principles

Units will be achieved through the acquisition of evidence by the learner and submission to their assessor. Units may be assessed through a number of different sources and forms, which must meet the requirements of the skills and knowledge requirements.

- Assessment should normally be at the learner's workplace, but where the opportunity to assess across the range of standards is unavailable other comparable working environments may be used, following agreement from the External Verifier.
- A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks e.g. if the learner is allocating work to their team, their communication skills and leadership style can also be assessed against both the units covering communication and leading people.
- Assessors can only assess in their acknowledged area of occupational competence.
- Assessors and IVs will be registered with their centre and be accountable to the organisation for their assessment practice.
- Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or verification activities does not feel that there is due regard to health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety is being taken.

5.3 Characteristics of assessment guidance

The learner may produce evidence from a range of examples (as outlined below) which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can meet all the learning outcomes of a unit and pass all the skills and knowledge requirements of a unit.

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

5.4 Types of evidence

Evidence is not required in any pre-set format and may be of many types and from diverse sources. Examples of types of evidence might include:

- learner statement
- notes
- review and tutorial records
- report
- diary
- worksheet
- audio/video recorded
- discussion/presentation/interview
- assessor observation
- witness statement
- product
- workbook

Please note that centres are not restricted to the types of evidence listed above.

5.5 Professional discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed.

5.6 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

5.6.1 Simulation

Simulation can only be used to assess learners where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. There are no units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

5.6.2 Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on learner's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards (NOS), such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

5.7 Recognition of prior learning (RPL)

RPL is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a component of a qualification through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

This evidence will need to be referenced clearly on recording documentation and will need to be appropriately authenticated and validated, perhaps by an employer or expert witness.

Assessment must be valid and reliable to ensure the integrity of the award. The evidence gathered must meet the standards of the qualification or component and the assessment process must be subject to the same quality assurance procedures as any other assessment process. In summary, evidence submitted to the RPL process must:

- be authentic and prove conclusively that RPL is based on the learner's own work;
- meet the requirements of the current the skills and knowledge requirements and be appropriate to the content of the component or qualification being considered for RPL;
- be sufficient to conclusively prove consistency of learner performance in meeting the skills and knowledge requirements

6 Units

Unit Handbook

OM1 – Operational management

Unit reference number: R/616/7251

Level: 5

Guided Learning (GL) hours: 29

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their competence to manage operationally by utilising their commercial awareness to identify and shape new opportunities in line with organisational objectives. It also provides the opportunity to input into strategic planning and create operational, sales and marketing plans which they will deliver, and against which, they will monitor performance. They will also be able to support, manage and communicate change by identifying barriers and overcoming them, as well providing management information.

Learning outcomes

There are five outcomes to this unit. The learner will:

LO1 Input into strategic planning and create plans in line with organisational objectives

LO2 Support, manage and communicate change by identifying barriers and overcoming them

LO3 Demonstrate commercial awareness, and able to identify and shape new opportunities

LO4 Create, deliver and monitor performance against an operational, sales and marketing plan

LO5 Provide management information

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Operational management approaches and planning models may include:

- conventional strategic planning
- issues-based strategic planning
- organic strategic planning
- real-time strategic planning
- alignment model of strategic planning
- inspirational model of strategic planning

Contingencies may include:

- movement of timescales
- unavailability of staff members
- resource reduction
- amended process or procedure
- external influences

Change management models may include, but are not be limited to:

- John Kotter's eight steps to change
- Bridge's transition model
- Rodger's technology adoption curve
- Kubler-Ross five stage model
- Prosci's ADCAR model (Awareness, Desire, Knowledge, Ability and Reinforcement)

Barriers to the initiation and management of change may include, but are not be limited to:

- Lack of understanding by those affected by the change
- Lack of leadership
- Lack of focus and strong project management of the change
- No engagement and/or buy-in of key stakeholders
- No clear process for managing endings and beginnings, and co-ordinating the change process
- Staff members' issues/ barriers to change are not defined and there are no actions to address them
- Staff members' practices are not reviewed and re-aligned
- Successes are not recognised, communicated and/or celebrated
- Progress is not measured and the learning is not reviewed

Tools and techniques used to identify and plan for business development, commercial opportunities and risks may include, but are not be limited to:

- SWOT (strengths, weaknesses, opportunities and threats)
- PESTLE (political, economic, social, technological, legal and environmental)
- Scenario planning (a technique that builds various plausible views of possible futures for a business)
- Critical success factor analysis (a technique to identify the areas in which a business must succeed in order to achieve its objectives)
- The five forces (potential entrants, existing competitors, buyers, suppliers and alternative products/services).

Management information systems can be categorised as:

- transaction processing
- decision support
- knowledge management
- learning management
- database management
- office information

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to input into strategic planning and create plans in line with organisational objectives	1.1 Analyse a range of operational management approaches and planning models
	1.2 Describe the management systems, processes and contingency planning used to create those plans
	1.3 Make viable contributions that are consistent with strategic objectives and resource constraints
	1.4 Create and implement plans in line with organisational objectives
	1.5 Evaluate the impact of the proposed strategy on the business

Learning Outcome	Assessment Criteria
LO2 Be able to support, manage and communicate change by identifying barriers and overcoming them	2.1 Evaluate the characteristics and application of a range of change management models for different organisational structures
	2.2 Analyse organisational cultures and diversity and their impact on leading and managing change
	2.3 Analyse barriers to the initiation and management of change
	2.4 Identify strategies that can be used to overcome barriers
	2.5 Justify with evidence, the selected strategy to be taken to support and manage a change
	2.6 Develop a change plan that specifies specific, measurable, achievable, realistic and time-bound objectives and resources
	2.7 Take action to ensure the change plan is implemented in accordance with organisational values and procedures
	2.8 Evaluate aspects of change that were successful and ascertain why other aspects were not successful

Learning Outcome	Assessment Criteria
LO3 Be able to demonstrate commercial awareness, and able to identify and shape new opportunities	3.1 Analyse tools and techniques used to identify business development, commercial opportunities and risks
	3.2 Explain how the external environment impacts on the business
	3.3 Explain the need and benefits of continuous improvement
	3.4 Carry out an analysis of the business to identify new opportunities and risks
	3.5 Make commercially focused decisions and arguments to shape new opportunities
	3.6 Assess the commercial impact of managerial decisions on new opportunities

Learning Outcome	Assessment Criteria
LO4 Be able to create, deliver and monitor performance against an operational, sales and marketing plan	4.1 Use operational business planning techniques to create an operational, sales and marketing plan
	4.2 Manage resources to meet the requirements of the operational, sales and marketing plan
	4.3 Monitor performance against the targets of the operational, sales and marketing plan
	4.4 Evaluate the achievement of the targets within the operational, sales and marketing plan
	4.5 Use the evaluation of the achievement of the targets to identify potential areas of improvement

Learning Outcome	Assessment Criteria
LO5 Be able to provide management information	5.1 Analyse the benefits of a management information system to an organisation
	5.2 Assess the impact of data security on the provision of management information
	5.3 Provide management reports and information within agreed timescales
	5.4 Evaluate the ease of access to the inputting and retrieval of management information

OM1 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM2 – Project management

Unit reference number: Y/616/7252

Level: 5

Guided Learning (GL) hours: 18

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their competence to use project management techniques to plan, organise and manage a project to deliver required outcomes and to then to evaluate the effectiveness of that project.

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Plan and organise a project to deliver required outcomes

LO2 Manage a project to deliver required outcomes

LO3 Evaluate the effectiveness of a project

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements

Assessment guidance

A **project plan** should contain:

- nature of the project
- background to the project
- aims and objectives of the project
- resources required
- deliverables
- measurement of outcomes/progress and quality control
- schedule of work and methodology
- time scales and schedules
- project costings

Project planning and management tools and techniques may include, but are not be limited to:

- Gantt chart – this is used to track both time and interdependencies between tasks
- Logic Network – this indicates the sequence of activities in a project over time. It shows which activity logically precedes or follows another activity.
- PERT (Program Evaluation and Review Technique) chart – this is used to analyse the tasks involved in completing a given project, especially the time needed to complete each task and identifying the minimum time required to complete the total project.

Risks and contingencies may include, but are not be limited to:

- movement of timescales
- unavailability of staff members
- resource reduction
- amended process or procedure
- external influences

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to plan and organise a project to deliver required outcomes	1.1 Evaluate project planning and management tools and techniques
	1.2 Analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work
	1.3 Agree the objectives and scope of proposed projects with stakeholders
	1.4 Assess the interdependencies and potential risks within a project
	1.5 Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan
	1.6 Develop proportionate and targeted plans to manage identified risks and contingencies
	1.7 Apply project lifecycle approaches to the progress of a project

Learning Outcome	Assessment Criteria
LO2 Be able to manage a project to deliver required outcomes	2.1 Allocate resources in accordance with the project plan
	2.2 Brief project team members on their roles and responsibilities
	2.3 Implement plans within agreed budgets and timescales
	2.4 Communicate the requirements of the plans to those who will be affected
	2.5 Revise plans in the light of changing circumstances in accordance with project objectives and identified risks
	2.6 Keep stakeholders up to date with developments and problems
	2.7 Complete close-out actions in accordance with project plans
	2.8 Adhere to organisational policies and procedures, legal and ethical requirements when managing a project

Learning Outcome	Assessment Criteria
LO3 Be able to evaluate the effectiveness of a project	3.1 Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources
	3.2 Evaluate the effectiveness of capturing and managing project-related knowledge
	3.3 Report on the effectiveness of plans

OM2 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM3 – Financial management

Unit reference number: D/616/7253

Level: 5

Guided Learning (GL) hours: 28

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their competence to manage financial activities by monitoring and analysing budgets, adjusting those budgets to reflect financial decisions and also by providing the required financial reports.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Monitor budgets and provide reports

LO2 Adjust budgets to reflect financial decisions

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

A **budget** is a financial plan for a defined period of time. It may also include planned sales volumes and revenues, resource quantities, costs and expenses, assets, liabilities and cash flows.

Contingencies may include, but are not be limited to:

- movement of timescales
- unavailability of staff members
- resource reduction
- amended process or procedure
- external influences

A **budget-related report** is an internal report used by management to compare the estimated, budgeted projections with the actual performance number achieved during a period. A budget report is designed to compare how close the budgeted performance was to the actual performance during an accounting period.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to monitor budgets and provide reports	1.1 Explain how to calculate the estimated costs of activities, resources and overheads needed to achieve financial objectives
	1.2 Explain the purposes of budget-setting and the benefits of financial forecasting
	1.3 Analyse the information needed to enable realistic budgets to be set
	1.4 Explain how to address contingencies
	1.5 Identify the cause of variations from budget
	1.6 Explain the actions to be taken to address variations from budget
	1.7 Provide budget-related reports and information within agreed timescales

Learning Outcome	Assessment Criteria
LO2 Be able to adjust budgets to reflect financial decisions	2.1 Use the budget to control performance and expenditure
	2.2 Propose realistic revisions to budget, supporting recommendations with evidence
	2.3 Explain the actions to be taken in the event of suspected instances of fraud or malpractice
	2.4 Identify successes and areas for improvement in budget management
	2.5 Make recommendations to improve future budget setting and management

OM3 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM4 – Leading people

Unit reference number: H/616/7254

Level: 5

Guided Learning (GL) hours: 35

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their competence to lead their team and others by adopting an effective leadership style to achieve positive outcomes and by delivering allocated goals and targets through delegation. It will also allow the learner to communicate organisational vision and goals to their team and others and to support development through coaching and mentoring

Learning outcomes

There are four outcomes to this unit. The learner will:

- LO1 Communicate organisational vision and goals
- LO2 Adopt an effective leadership style to achieve positive outcomes
- LO3 Support development through coaching and mentoring
- LO4 Deliver allocated goals and targets through delegation

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Behaviours and attitudes may include one or more of the following:

- being clear and up-to-date about what needs to be achieved at all times and clearly communicating expectations to others
- remaining focused, resilient, and optimistic, even during challenging times and always displaying a “Can Do” attitude
- encouraging the team to share ideas and best practice within the team as well as across teams
- displaying genuine passion and energy for the organisation’s vision and its values
- being open and approachable so others feel free to share their views and ideas
- adapting own style and approach to influence, motivate and get the best from others

Leadership styles may include, but are not be limited to:

- supporting
- empowering
- directing
- leading
- motivating

Motivation techniques could include, but are not be limited to:

- consulting and involving staff in decision-making
- empowering staff to be more accountable
- providing opportunities for development
- recognising/rewarding achievement
- inspiring staff to meet targets/goals

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to communicate organisational vision and goals	1.1 Display behaviours and attitudes that show a commitment to the fulfilment of the organisation's vision and the expression of its values
	1.2 Take action to ensure that own team and colleagues understand their role in the achievement of organisational targets
	1.3 Take action to secure the on-going commitment of own team and colleagues to fulfil the organisation's vision and goals

Learning Outcome	Assessment Criteria
LO2 Be able to adopt an effective leadership style to achieve positive outcomes	2.1 Explain the benefits of effective leadership for an organisation
	2.2 Analyse the use of personal motivational drivers to achieve positive outcomes
	2.3 Analyse the characteristics of effective leadership styles and their impact on teams and individuals
	2.4 Adopt an effective leadership style to achieve positive outcomes
	2.5 Use motivational techniques to achieve organisational targets

Learning Outcome	Assessment Criteria
LO3 Be able to support development through coaching and mentoring	3.1 Explain how the use of questioning techniques can raise an awareness and increase responsibilities and ownership in others
	3.2 Analyse how a positive attitude can impact on the effective coaching of others
	3.3 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
	3.4 Provide information, resources and ongoing mentoring to help individuals meet their targets, objectives and quality standards
	3.5 Monitor individuals' progress towards objectives in accordance with agreed plans

Learning Outcome	Assessment Criteria
LO4 Be able to deliver allocated goals and targets through delegation	4.1 Agree the allocated goals and targets to be achieved
	4.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
	4.3 Empower others to take responsibility for their decisions and actions within their own responsibility
	4.4 Apply motivation techniques to maintain morale
	4.5 Adapt plans, priorities and resource allocations to meet changing circumstances and priorities
	4.6 Evaluate the achievement of the goals and targets

OM4 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM5 – Managing people

Unit reference number: K/616/7255

Level: 5

Guided Learning (GL) hours: 34

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their understanding of the management of talent and performance and to utilise this understanding to develop, build and motivate teams and to recruit talent to the organisation

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Understand the management of talent and performance

LO2 Recruit talent to the organisation

LO3 Develop, build and motivate teams

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Principles underpinning human resource management may include, but are not limited to:

- supporting succession planning
- reinforcing the recruitment process
- analysing performance management
- assisting the performance appraisal process
- co-ordinating training and development
- maintaining staff relations
- addressing grievances
- providing welfare
- operating management information systems

Workforce planning models may include, but are not be limited to:

- succession planning
- flexible working
- demand supply forecasting
- skills audit/gap analysis
- talent management
- multi-skilling
- role design
- risk management
- outsourcing

A **resourcing plan** for staff recruitment should include, but is not be limited to:

- types of staff required for the needs of the organisation
- roles and key responsibilities for each member of staff
- number of staff required to fill each role
- methods of recruitment/support
- timescales
- preferred outcome

Delegation techniques may include, but are not be limited to:

- selecting an individual/team with suitable skills, resources and expertise
- providing clear instructions and monitoring progress

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the management of talent and performance	1.1 Analyse the principles underpinning human resource management
	1.2 Explain methods of analysing human resourcing needs
	1.3 Analyse workforce planning models
	1.4 Explain the importance of a systematic approach to talent management
	1.5 Analyse approaches to the identification and management of talent which may contribute to the achievement of organisational goals

Learning Outcome	Assessment Criteria
LO2 Be able to recruit talent to the organisation	2.1 Analyse current and future skills needs from identified staffing needs
	2.2 Develop a resourcing plan that addresses identified needs within budgetary limitations
	2.3 Evaluate the cost-effectiveness of different methods of recruitment for an identified role
	2.4 Plan assessment processes that are valid and reliable
	2.5 Provide those involved in the selection process with sufficient information to enable them to make informed decisions
	2.6 Justify assessment decisions with evidence
	2.7 Inform applicants of the outcome of the process in line with organisational procedures
	2.8 Evaluate the effectiveness of the recruitment and selection process

Learning Outcome	Assessment Criteria
LO3 Be able to develop, build and motivate teams	3.1 Analyse the relationship between job satisfaction, commitment, motivation, empowerment and business performance
	3.2 Make planning and resourcing decisions that optimise the available team resources, skills and expertise
	3.3 Use delegation techniques whilst delivering targets
	3.4 Empower individuals to take responsibility for their decisions and actions within agreed parameters
	3.5 Adapt plans, priorities and resource allocations to meet changing circumstances and priorities

OM5 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM6 – Building relationships

Unit reference number: M/616/7256

Level: 5

Guided Learning (GL) hours: 28

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate their competence of how to develop and maintain working relationships with others, collaborate with them to resolve problems and maintain professional networks.

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Develop and maintain working relationships with others

LO2 Collaborate with others to resolve problems

LO3 Maintain professional networks

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Influencing skills and techniques may include, but are not be limited to:

- creating a rapport
- using listening skills
- asking the right questions
- being aware of body language
- selling the benefits
- being relaxed
- investing time in the process

Expectation management may include, but is not be limited to:

- knowing what you can and can't deliver
- educating your customer to meet expectations
- negotiating realistic timescales and deadlines
- identifying potential problems and delays
- communicating often
- continuously monitoring expectations
- delivering on promises

For learners in large complex organisations external **collaboration with others** could include other departments/branches within the same organisation.

Advantages of **maintaining a professional network** may include, but are not be limited to:

- cultivating business leads
- identifying career opportunities
- developing personal opportunities
- identify best practices
- being aware new business trends

Networks could cover, but not be limited to:

- online networking (social media)
- face-to-face networking
- professional network services
- formal networking (weekly/monthly meetings and referrals)

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to develop and maintain working relationships with others	1.1 Explain how influencing skills and techniques can be used to enhance the relationship with others
	1.2 Analyse how expectation management and conflict resolution techniques are applied to the management of others
	1.3 Evaluate the contribution of others to the achievement of result-focused objectives
	1.4 Demonstrate collaborative behaviours when dealing with others
	1.5 Minimise the potential for friction and conflict when dealing with others
	1.6 Fulfil agreements made with others
	1.7 Provide support and feedback to others
	1.8 Identify and share good practice with others

Learning Outcome	Assessment Criteria
LO2 Be able to collaborate with others to resolve problems	2.1 Explain the benefits of collaborating with others to solve problems
	2.2 Create a climate of mutual trust and respect by behaving openly and honestly
	2.3 Take ownership of problems within own level of authority
	2.4 Recognise the collaboration of others to assist in resolving problems
	2.5 Take account of the specialist advice and support provided by others
	2.6 Take action to resolve problems whilst minimising disruption to work activities
	2.7 Reflect on the effectiveness of the collaboration and the resolution of the problem

Learning Outcome	Assessment Criteria
LO3 Be able to maintain professional networks	3.1 Describe the interpersonal skills needed for effective networking
	3.2 Evaluate the role of shared agendas and conflict management in relationship-building
	3.3 Promote their own skills, knowledge and competence to network members
	3.4 Provide information, services or support to network members where the potential for mutual benefit has been identified
	3.5 Agree guidelines for the exchange of information and resources
	3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs
	3.7 Assess the benefits and limitations of joining and maintaining selected networks

OM6 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM7 – Communicating information

Unit reference number: T/616/7257

Level: 5

Guided Learning (GL) hours: 25

Unit aim

The aim of this unit is to provide the learner with the opportunity demonstrate their competence to communicate information effectively. This will cover the chairing of meetings, the development and delivery of presentation and the use of active listening and the provision of constructive feedback.

Learning outcomes

There are four outcomes to this unit. The learner will:

LO1 Communicate effectively

LO2 Chair meetings

LO3 Develop and deliver presentations

LO4 Use active listening and the provision of constructive feedback

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Overarching **communication systems** may include, but are not limited to:

- Internal – happen within the business
- external – take place between the business and outside individuals or organisations
- vertical – messages sent between staff belonging to different levels of the organisation hierarchy
- horizontal – messages sent between staff on the same level of the organisation hierarchy
- formal – official messages sent by an organisation, e.g. a company memo, fax or report
- informal – unofficial messages not formally approved by the business, e.g. everyday conversation or gossip between staff

Types of **communication media** may include, but are not limited to:

- physical media, such as large meetings, departmental meetings (weekly meetings), up close and personal (exclusive meetings), viral communication or word of mouth, etc.
- mechanical media, such as e-mail, weekly letters or newsletters, personal letters, magazines or papers, social media, etc.

Types of **meetings** may include, but are not limited to:

- status update
- information sharing
- decision making
- problem solving
- innovation
- team building

Types of presentations may include, but are not limited to:

- informative
- demonstrative
- persuasive
- inspirational

Constructive feedback is defined as information-specific, issue-focused, and based on observations.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to communicate effectively	1.1 Evaluate the effectiveness of different communication systems
	1.2 Analyse how to adapt communication techniques to meet audience needs
	1.3 Identify the purpose and audience of the information to be communicated
	1.4 Select communication media that are appropriate to the audience and information to be communicated
	1.5 Present information in the format, layout and style that is appropriate to the information to be communicated
	1.6 Adapt the style and content of a communication, appropriate to specific audiences
	1.7 Meet agreed deadlines in communicating with others

Learning Outcome	Assessment Criteria
LO2 Be able to chair meetings	2.1 Analyse the purpose and benefits of meetings
	2.2 Follow organisational procedures in the conduct of a meeting
	2.3 Facilitate meetings in a manner which involves all those present and results in an agreed outcome
	2.4 Manage the agenda within the timescale of the meeting
	2.5 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements
	2.6 Evaluate the effectiveness of the meeting and identify points for future improvements

Learning Outcome	Assessment Criteria
LO3 Be able to develop and deliver presentations	3.1 Analyse the different types of presentation and their requirements
	3.2 Identify and prepare resources for delivery of the presentation
	3.3 Structure the presentation in line with its objectives
	3.4 Deliver a presentation that captures and retains the audience's attention
	3.5 Provide the audience with opportunities to ask questions and raise concerns
	3.6 Evaluate the effectiveness of the presentation

Learning Outcome	Assessment Criteria
LO4 Be able to use active listening and the provision of constructive feedback	4.1 Use effective questioning and listening to support the provision of constructive feedback
	4.2 Describe the importance of constructive feedback within the organisation
	4.3 Analyse how constructive feedback can positively influence the performance of others
	4.4 Describe the techniques used to give constructive feedback
	4.5 Describe the range of blockages to receiving constructive feedback
	4.6 Provide constructive feedback to positively improve the performance of others
	4.7 Self-assess the delivery of the constructive feedback

OM7 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM8 – Awareness of self and others in the workplace

Unit reference number: A/616/7258

Level: 5

Guided Learning (GL) hours: 21

Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of development requirements and utilise this knowledge to demonstrate how to identify and fulfil their personal and professional development needs and to identify the impact of their behaviour on others in the workplace.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Identify own personal and professional development requirements

LO2 Identify the impact of own behaviour on others in the workplace

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

SMART objectives are:

- specific
- measurable
- achievable
- realistic
- timely (or time bound)

A **development plan** should include, but is not be limited to:

- identification of development needs
- identification of possible learning opportunities
- the formulation of an action plan
- a record of the outcome of the development undertaken
- an evaluation and review of the plan

Informal development opportunities may include, but are not be limited to:

- personal study/research
- webinars
- reading, researching information via the internet,
- experiential/workplace learning, reading and research
- reading relevant publications, e.g. professional body journals, business journals, etc.
- preparation of research for workplace projects
- workplace learning/support
- coaching, mentoring, peer review, work shadowing/secondments, meetings or project work

Formal development opportunities may include, but are not be limited to:

- participation in external or in-house development training courses/activities provided by employers
- sharing professional knowledge in a formal setting
- lecturing, teaching and addressing meetings on relevant subject matter
- being an examiner or being involved in professional or higher education that is relevant

Emotional intelligence is the ability to identify and manage own emotions and the emotions of others. It is generally said to include three skills:

- emotional awareness of others
- the ability to harness emotions and apply them to tasks like thinking and problem solving
- the ability to manage emotions, which includes regulating own emotions, and developing a strategy to support others to work effectively

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to identify own personal and professional development requirements	1.1 Self-analyse own current and future personal and professional development needs relating to their role, their team and their organisation
	1.2 Use feedback on own working style from others to identify own development needs
	1.3 Identify trends and developments that influence the need for own professional development
	1.4 Analyse the benefits of formal and informal development opportunities to meet own development needs

Learning Outcome	Assessment Criteria
LO2 Be able to identify the impact of own behaviour on others in the workplace	2.1 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
	2.2 Display behaviours and attitudes that show a commitment to the fulfilment of the organisation's vision and the expression of its values
	2.3 Adjust interpersonal behaviour to reflect the use of emotional intelligence

OM8 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM9 – Management of self

Unit reference number: F/616/7259

Level: 5

Guided Learning (GL) hours: 17

Unit aim

The aim of this unit is to provide the learner with the opportunity to demonstrate the use time management techniques to manage workload and pressure and to demonstrate how to create an effective personal development plan

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Be able to use time management techniques to manage workload and pressure

LO2 Be able to create an effective personal development plan

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

Distractions could include, but are not be limited to:

- e-mails (personal and work)
- text messages
- social media and other websites not related to work
- personal calls,
- spontaneous interruptions by others
- informal unscheduled meetings
- last minute requests

Work-life balance refers to the level of prioritisation between personal and professional activities in an individual's life and the level to which activities related to their job are present in the home.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to use time management techniques to manage workload and pressure	1.1 Plan and manage workloads and priorities using time management tools and techniques
	1.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
	1.3 Explain the benefits of achieving an acceptable 'work-life balance'

Learning Outcome	Assessment Criteria
LO2 Be able to create an effective personal development plan	2.1 Evaluate the benefits of personal and professional development
	2.2 Create a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
	2.3 Make use of formal and informal development opportunities that are consistent with business needs and contribute to the achievement of personal development objectives
	2.4 Evaluate the effectiveness of the development opportunities against agreed objectives and amend plans accordingly

OM9 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

OM10 – Decision making

Unit reference number: T/616/7260

Level: 5

Guided Learning (GL) hours: 28

Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of problem solving and decision-making techniques and use them to demonstrate the use of effective problem-solving techniques to make decisions.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Understand problem-solving and decision-making techniques

LO2 Use of effective problem-solving techniques to make decisions

Unit content

Evidence requirements

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

Assessment guidance

The potential impact of decision making could include, but is not be limited to:

- ways of working
- productivity
- staff morale
- wastage

Problems may include, but are not be limited to:

- operational
- financial
- staffing
- logistical

The **decision-making process** may include the following steps:

- identifying the decision to be made
- gathering any relevant information
- identifying alternative solutions/outcomes
- analysing the evidence to identify a solution/outcome
- choosing a solution/outcome
- taking action to implement the solution/outcome
- reviewing the decision made and its impact

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand problem solving and decision-making techniques	1.1 Explain the need to define the objectives, scope and success criteria of the decisions to be taken
	1.2 Assess the impact of organisational values and ethics on the decision-making process
	1.3 Explain the importance of obtaining sufficient valid data to enable effective decision making
	1.4 Compare the use of problem-solving techniques which can be used to achieve required outcomes

Learning Outcome	Assessment Criteria
LO2 Be able to use of effective problem-solving techniques to make decisions	2.1 Define the objectives, scope and success criteria of the decisions to be taken
	2.2 Use data and critical analysis to collate valid information to be used in the decision-making process
	2.3 Use accurate and current information to develop ideas to present to others
	2.4 Structure ideas, information and recommendations in a meaningful way
	2.5 Pro-actively engage with colleagues involved in the decision-making process
	2.6 Assess contributions made to the decision-making process
	2.7 Identify and agree criteria for making a decision which align with business objectives, values and policies
	2.8 Evaluate ways to monitor the impact of decisions and identify learning points to improve future decisions

OM10 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

OMD5 Document History

Version	Issue Date	Changes	Role
v2	08/02/2023	Formatting and re-branding. No content amendment.	Data Administrator