RECOGNISING ACHIEVEMENT

Applied AS/A Level GCE

Applied Business

Advanced Subsidiary GCE **H026**

Advanced Subsidiary GCE (Double Award) **H226**

Advanced GCE **H426**

Advanced GCE (Double Award) **H626**

For first assessment in January 2010

LEGAL

projections

January 2010

additional support/guidance

Oxford Cambridge and RSA Examinations

Contents

Introduction to these Support Materials

The following pack of support materials has been designed to assist centres with the delivery and assessment of the GCE in Applied Business specification, H026, H226, H426 and H626. These materials can be used as a teacher resource for individual study or the basis for departmental INSET.

The support materials are divided into a number of different sections including:

- exemplification of one of the GCE in Applied Business units
- teaching and learning strategies for each of the portfolio units
- unit recording sheets for each of the portfolio units
- external unit support for the three examined units including schemes of work, lesson plans and exemplar answers.

It is hoped these support materials will give centres useful additional material to that provided in the GCE in Applied Business specifications which will, over time, improve and enhance the delivery and approach to these units within a particular centre.

It is also hoped that centres will devise additional materials of their own when planning for and delivering the GCE in Applied Business specifications. OCR would welcome the opportunity to review these support materials and provide invaluable feedback to centres through its coursework consultancy process. If centres have produced case studies, assignments, resource sheets or any form of support they are invited to submit a sample of this material to OCR. Informal feedback can then be given on whether the material is ‘fit for purpose’ and the material, with the centre’s permission, can also be circulated for use by other centres in the planning for and delivery of the GCE in Applied Business specifications.

In addition to these support materials, centres will have the opportunity to further update their support provision by either:

- monitoring OCR’s web-site (www.ocr.org.uk) for further updates and resources on the GCE in Applied Business or;
- joining the e-community created for the GCE in Applied Business specification. This e-community provides teachers with the opportunity to share good practice on-line with regard to the delivery of the new specification. To find out more about on-line membership please use the attached hyperlink: http://community.ocr.org.uk/lists/listinfo/applied_gce_business and become part of the Applied Business e-community

Please Note: Materials can also be downloaded from OCR’s website.

AS Level Course Structure

Units

The AS GCE specifications in Applied Business are divided into two distinctive sections: the AS GCE in Applied Business and the AS GCE in Applied Business (Double Award). Within both AS specifications candidates will be asked to demonstrate and apply their knowledge and understanding in a range of business contexts. There will be a reduced focus on the higher order skills, notably evaluative judgemental skills which will be developed more fully at A2 level. This distinction is important for centres as it should be reflected in the emphasis given to developing these skills in preparation for each internal/external assessment.

If candidates opt for the AS GCE in Applied Business they will study **three** mandatory units in total: **two** portfolio units and **one** external assessment. Those candidates moving onto the AS GCE in Applied Business (Double Award) will study a further three units: **one** external assessment and **two** portfolio units from a choice of **four**. Please see Section A of the Course Specification for details of the individual units.

Appropriate Models of Delivery

There a number of possible models of assessment pattern for the AS specifications. No one model will fit every centre and some centres will have a policy as to whether January assessment of units is allowable. The models which follow are for guidance purposes only and may be of particular benefit to centres who may have limited experience of introducing a vocational specification. For those more experienced centres, the models can of course be adapted to suit the centre's particular needs, depending on how vocational courses have been introduced in the past.

Looking more closely at the AS specifications (further guidance will be provided at a later date on possible A2 delivery models), assuming that it is the intention of centres to enter units before the end of the course, and to allow the possibility of re-sit examinations, there are a number of possible approaches that can be taken.

Model 1 - Approach to Delivery of AS GCE in Applied Business

In most centres it is assumed that the three-unit AS GCE in Applied Business will be delivered by **one** teacher over the course of **one** academic year. Within these guidelines one might suggest the following model:

Term 1	Deliver Introductory Programme Deliver Unit 3: Understanding the business environment

Term 2	Candidates sit exam for Unit 3 in January examination session Deliver Unit 1: Creating a marketing proposal and Unit 2: Recruitment in the workplace - the delivery of these units crosses over into Term 3
Term 3	Unit 3 re-sit opportunity and enter Units 1 and 2 for moderation in Summer examination session

This model raises a number of discussion points:

- Does the Centre build a re-sit opportunity into the 12 month programme? Although the model suggests a re-sit opportunity for Unit 3, one could easily adapt the model to provide re-sit opportunities for Units 1 and 2.

General comment on re-sits: Centres will obviously devise their own policies for re-sits. Building into the process a re-sit for every candidate may, at face value, indicate an expectation of poor performance first time around, ie a planned failure. OCR would therefore advise that, for the majority of candidates, a re-sit facility should be seen very much as a second chance for the candidate and that the emphasis should be based on teaching the material once, towards one attempt at each assessment procedure.

- The centre should bear in mind that they have the portfolio consultancy service available to them from OCR, which will provide informal feedback on assessed work prior to formal moderation. For this reason alone, it may be that centres opt for Unit 3 as the re-sit opportunity, given the portfolio support that is available.

- The model shows Units 1 and 2 being delivered in the second and third terms. The units can of course be delivered in a discrete manner - ie one after the other or if timetabling constraints allow the units can instead be taught alongside one another depending on the centre's preference.

- The model does allow time for the delivery of the introductory programme allowing candidates' time to familiarise themselves with:

  - Key concepts within the framework of the AS GCE in Applied Business specification.

  - The learning opportunities and business skills they will be expected to demonstrate during the course.

- **More than one teacher?** If more than one teacher is involved with the delivery of the AS GCE in Applied Business then a less discrete model is possible with each teacher being responsible for areas of subject content across a number of units rather than the delivery of one particular unit. OCR would welcome such an approach but centres, if opting for this route, must ensure that all relevant areas of content are covered before candidates are entered for formal assessment, either in a portfolio or examination context.

Model 2 - Approach to Delivery of AS GCE in Applied Business (Double Award)

Again it is assumed that the six-unit AS GCE in Applied Business (Double Award) will be delivered by two or more teachers over the course of an academic year. Within these guidelines one might opt for the following model:

	Block 1	Block 2
Term 1	Deliver Introductory Programme	
	Deliver Unit 3: Understanding the business environment	Deliver Unit 4: The impact of customer service
Term 2	Candidates sit exam for Unit 3 in January examination session Deliver Unit 1: Creating a marketing proposal Deliver **one** of Units 5-8	Candidates sit exam for Unit 4 in January examination session Deliver Unit 2: Recruitment in the workplace Teach **one** of Units 5-8
Term 3	Unit 3 re-sit opportunity Enter Unit 1 and **one** of Units 5-8 for moderation	Unit 4 re-sit opportunity Enter Unit 2 and **one** of Units 5-8 for moderation

This model also raises a number of discussion points:

- Two teachers allows for a symmetrical delivery approach. Each teacher can deliver one external unit, one mandatory portfolio unit and one of the optional units depending on specialisms and personal preference.

- The introductory programme can be split between the two teachers - one taking responsibility for content issues and the other providing advice for candidates on the learning approaches and business skills needed for successful completion of the AS specifications.

- Again a re-sit approach can be built into the programme for the external examinations for the same reasons given in Model 1.

- An integrated, less discrete approach can again be adopted for delivery of the unit content but, as for Model 1, full coverage must be ensured before candidates are entered for any kind of formative assessment.

- If teachers take responsibility for certain units it is vital that some form of internal standardisation process is built into the delivery model. This will ensure that the centre is consistent in its assessment of coursework units before formal moderation actually takes place.

- **More than two teachers?** Some Centres, especially larger schools or colleges, may have more teaching staff available to them for the delivery of the AS specifications. Adaptations and variants to the model provided may, as a result, take shape. For example, it may be that a college/school takes a team teaching approach to the delivery of the specification where groups of teaching staff take responsibility for a particular teaching block. Depending on skills and competencies the staff can decide between them how best to divide up the teaching of the block to which they have been assigned.

OCR has highlighted some of the issues centres will need to address in their approach to the delivery of the AS specifications. Whether there are two, four or six members of staff the same issues will crop up over and over again - the use of a re-sit policy, whether to teach units in a discrete manner or teach areas of content across a number of units, the need for an internal standardisation process and how to deliver the introductory programme etc. OCR would advise that a planning meeting is held with the teaching staff concerned to gain agreement on these and other issues before embarking on the delivery of the course.

Progression to the A2 Units

Models of delivery for the A2 units have also been provided. It is important that centres think about A2 progression at an early stage, however, as it may impact on their approach to the delivery of the AS specifications.

Considerations may include:

- Should teachers take on the responsibility for the delivery of certain AS units that are developed further at A2 through the use of vocational pathways? This approach would allow a more fluid progression between AS and A2 level. Examples of linkage are provided in the following table.

Course Structure

Units

The A2 specifications in Applied Business are divided into two distinctive sections: the GCE in Applied Business and the GCE in Applied Business (Double Award). Within both A2 specifications candidates will be required to formulate a series of strategies in relation to a range of different business contexts. There will be an increased focus on higher order skills – notably evaluative skills as candidates will be expected to critically evaluate aspects of their devised strategies. This emphasis is important for centres as it should be reflected in the emphasis given to developing these higher order skills in preparation for each internal/external assessment. Further information on the A2 units can be found on page 11-13 of the GCE in Applied Business specification.

Exit Strategies

Now all units are available to a centre (both AS and A2) it is important one understands the various exit strategies that are available to candidates from the GCE in Applied Business. These can be summarised as follows:

Exit Strategy 1 – Advanced Subsidiary GCE in Applied Business	These three units would usually be taken over one year with the sequence of units determined by the centre.
Exit Strategy 2 – Advanced Subsidiary GCE in Applied Business (Double Award)	This combination of units can be delivered over one or two years. The units will have to be delivered over one year if the cohort in a centre is intending to complete the GCE in Applied Business (Double Award). Again, the sequence of units can be determined by the centre and will no doubt be determined based on teacher/lecturer expertise in particular subject areas.
Exit Strategy 3 – GCE in Applied Business	The same principles apply for this strategy as above although it is expected a centre completes units 1, 2 and 3 before moving up a standard to complete the A2 units. Within the AS and A2 block the units can be delivered in any order depending on teaching expertise and what type of re-sit policy the centre wishes to employ.

AS Core Units (1, 2 and 3)

A2 Units (9, 10 and 1 from 11-16)

AS Core Units (1, 2 and 3)

AS Optional Units (4 and 2 from 5-8)

AS Core Units (1, 2 and 3)

Exit Strategy 4 – GCE in Applied Business (Double Award)	This course would usually be delivered over a two year period. Centres are advised to complete the six AS units before moving up a standard to complete the A2 units. Careful consideration needs to be given to the choice of unit at AS level as this strategy does allow for the pursuit of vocational pathways allowing candidates to specialise in a particular business discipline – whether it be finance, marketing or human resources. Alternatively, this strategy also proves flexible enough to enable candidates to study a general business programme should specialisation not be a key priority.

The following exit strategy is not possible:

A nine unit specification model as indicated above is **not** possible. Centres, having completed units 1,2 and 3, must then decide whether they wish to move onto and exit at **either** an Advanced Subsidiary GCE in Business **or** a GCE in Business six unit qualification. Centres must therefore decide early on in the course which exit strategy to follow and should not in any way attempt to follow a nine unit model.

A2 Units (2 from 11-16 and 1 from 17-18)

AS Optional Units (4 and 2 from 5-8)

A2 Units (9, 10 and 1 from 11-16)

AS Core Units (1, 2 and 3)

AS Optional Units (4 and 2 from 5-8)

A2 Units (9, 10 and 1 from 11-16)

AS Core Units (1, 2 and 3)

Choosing Appropriate Unit Combinations

As a cohort moves from the AS specifications into the A2 specifications there are a number of considerations one should bear in mind when choosing an appropriate blend of units to match the needs and wants of a particular cohort. These include:

- pursuit of vocational pathways – There is enough flexibility in the A2 specifications for candidates to opt for a particular business discipline.
- link with VCE Business units – Although it is expected that centres will look to update their resources for the new course it maybe the case that certain resources and materials, used on the VCE in Business, could be adapted for the new specification. Examples include:

VCE in Business	GCE in Applied Business (New Spec)
Business Planning	A Business Plan for the Entrepreneur
E-Commerce	Launching a Business On-line
Promoting Business Activities	Promotion in Action
Financial Accounting	Constructing a Financial Strategy
Business and the EU	Launching a New Product or Service in Europe
Training and Development	Training and Development
Business Law	Business Law
Health and Safety in the Workplace	Managing Risk in the Workplace

- excellent business links – It may be that centres, having established excellent links during the AS year, will want to use and manipulate these links further to provide a context for A2 units. This practice is supported by OCR as long as one bears in mind the different standards that are required. For example, in Unit F240: *Creating a Marketing Proposal*, candidates are expected to devise a marketing proposal to launch a new product or service. Candidates could then use and build on this context for Unit F252: *Promotion in Action* where they are expected to produce a promotional strategy for promoting this same product/service;

- extended OCR support for portfolio units – For Unit F253: *Constructing a Financial Strategy* OCR will be providing, each year, one case study for delivery of this unit. This material will be issued at the start of each academic year and will be available for downloading from OCR's website (www.ocr.org.uk).

Possible Delivery Models

Taking into account the advice given above there a number of possible delivery models for the A2 specifications. No one model will fit every centre and some centres will have a policy as to whether January assessment of units is permissible. The advice which follows is for guidance purposes only and may be of particular benefit to centres who may have limited experience of introducing a vocational specification. For those more experienced centres, this advice can of course be adapted to suit the centre's particular needs, depending on how vocational courses have been introduced in the past.

[Please Note: centres must bear in mind that the deadline for submitting marks to OCR and the moderator, each summer, will be 15th May. It may be that centres have to reconsider their current delivery models to ensure this deadline is adhered to. Given that a typical two year programme will have four windows of opportunity for either internal or external assessment, centres may have to seriously consider entering units in January to ensure they meet OCR administrative requirements. This is an important issue to consider during any departmental INSET that is used for planning the delivery of the GCE in Applied Business specification and applies as much to A2 as it does AS units].

Scenario 1: There is one teacher delivering the GCE in Applied Business in your centre. The aim is to take a cohort through a two year programme culminating in candidates achieving the GCE in Applied Business at the end of the second year.

	Year 1	Year 2
Term 1		Deliver Unit 9. If time allows begin delivery of Unit 10.
Term 2	This is the AS year where candidates will complete units 1, 2 and 3 of the Advanced Subsidiary GCE in Applied Business.	Candidates sit exam for Unit 9 in January examination session. Also there is an opportunity for candidates to re-sit any AS units taken in year 1. Continue to deliver Unit 10. Deliver **one** of Units 11-16. The delivery of this unit may cross over into Term 3.
Term 3		Unit 9 re-sit opportunity. Enter Unit 10 and **one** of Units 11-16 for moderation. Further year one resit possibilities.

Year 1 guidance has already been provided in the AS Teacher Support Materials but the Year 2 model does raise further discussion points:

- There will be no introductory programme to deliver in Year 2, thus enabling centres to launch immediately into the delivery of Unit F248: *Strategic Decision Making*.

- The centre should bear in mind that, just as in year 1, they have the portfolio consultancy service available to them from OCR, which will provide informal feedback on assessed work prior to formal moderation. For this reason alone, it may be that centres opt for Unit 9 as the re-sit opportunity given the portfolio support that is available.

- Year 2 does provide candidates with two further windows of opportunity for either internal or external assessment. This applies to AS units as much as A2 units should candidates wish to improve their grades/marks from units entered in the first year.

- Due to the strategic theme of the second year candidates may be best served starting off with Unit 9. This unit will provide them with an invaluable insight into the strategic decision making process and will allow them to develop skills which they can call upon when devising their own strategies for the coursework units.

- More than one teacher? If more than one teacher is involved with the delivery of the GCE in Applied Business then a less discrete model is possible with each teacher being responsible for areas of subject content across a number of units rather than the delivery of one particular unit. OCR would welcome such an approach but centres, if opting for this route, must ensure that all relevant areas of content are covered before candidates are entered for formal assessment, either in a portfolio or examination context.

Scenario 2: There are two teachers delivering the GCE in Applied Business (Double Award) in your centre. The aim is to take a cohort through a two year programme culminating in candidates achieving the Double Award at the end of the second year.

<table>
<tr><td>Year 1</td><td colspan="2">This is the AS year where candidates will complete units 1,2 and 3 of the Advanced Subsidiary GCE in Applied Business and units 4 and 2 from 5 to 8 of the Advanced Subsidiary GCE in Applied Business (Double Award).</td></tr>
<tr><td>Year 2</td><td>Block 1</td><td>Block 2</td></tr>
<tr><td></td><td>Deliver Unit 9.
If time allows begin delivery of Unit 10.</td><td>Deliver Unit 17 or 18.
If time allows begin delivery of one of Units 11-16.</td></tr>
<tr><td rowspan="2">Term 2</td><td colspan="2">Candidates sit exam for Unit 9 and one of 17 or 18 in January examination session. Also there is an opportunity for candidates to re-sit any AS units taken in year 1.</td></tr>
<tr><td>Continue to deliver Unit 10. Deliver one of Units 11-16. The delivery of this unit may cross over into Term 3.</td><td>Continue to deliver one of Units 11-16. Deliver another of Units 11-16. The delivery of this unit may cross over into Term 3.</td></tr>
<tr><td>Term 3</td><td colspan="2">Unit 9 and one of 11-16 re-sit opportunity.
Enter Unit 10 and three of 11-16 for moderation.
Further year one re-sit possibilities.</td></tr>
</table>

Year 1 guidance has already been provided in the AS Teacher Support Material but the year 2 model does again raise further discussion points:

- Two teachers, each adopting a teaching block, does allow for a symmetrical delivery approach. Each teacher in year 2 can deliver one external unit and two portfolio units depending on specialisms and personal preference.

- A re-sit approach is again possible and can be built into the programme for the external examinations for the same reasons given in Scenario 1. It will also be possible in either the January or June window of year 2 to re-sit units taken in year 1 should candidates wish to improve their marks/grades before aggregating at the GCE in Applied Business (Double Award).

- If teachers take responsibility for delivery of certain units in year 2, it is imperative that, just as with year 1, some form of internal standardisation process is built into the delivery model. This will ensure that the centre is consistent in its assessment of coursework units before formal moderation actually takes place.

- It would greatly help the fluidity of the course if in year 2 teachers took responsibility for the delivery of A2 units that naturally followed from units delivered at AS level. One notable example is Unit 3: *Understanding the Business Environment taken* in year 1 followed by Unit 9: *Strategic Decision Making* in year 2. Both of these externally assessed units are similar in that they require candidates to consider the decision making process in relation to the internal/external business environment. A teacher/lecturer who has delivered unit 3 in year 1 would therefore be more confident and familiar with the material needed to teach unit 9 in year 2 as both units focus on the decision making process a business goes through.

- More than two teachers? Some centres, especially larger schools or colleges, may have more teaching staff available to them for the delivery of the A2 specifications. Adaptations and variants to the model provided may, as a result, take shape. For example, it may be that a college/school takes a team teaching approach to the delivery of the specification where groups of teaching staff take responsibility for a particular teaching block. Depending on skills and competencies the staff can decide between them how best to divide up the teaching of the block to which they have been assigned.

OCR has highlighted some of the issues centres will need to address in their approach to the delivery of the A2 specifications. Whether there are two, four or six members of staff the same issues will crop up over and over again – the use of a re-sit policy, the need for an internal standardisation process, the linkage of units between year 1 and 2 and the focus on vocational pathways etc. OCR would advise that a planning meeting is held with the teaching staff concerned to gain agreement on these and other issues before embarking on the second year of the new course.

Unit F240: Creating a marketing proposal

Introduction

In this unit candidates are required to undertake an investigation into a suitably sized business in order to produce a marketing proposal. The selected business must be of a sufficient size to enable candidates to meet the requirements of the unit.

Candidates will need to know and understand:

- marketing objectives
- functional areas of a business and their supporting role
- how to undertake market research, analyse and use their market research findings
- the marketing mix
- presentation skills
- how to judge the potential success of their marketing proposal.

Candidates need to ensure that an appropriate business is chosen at the outset of this unit to allow them to use the context of the marketing department within their business for their marketing proposal. As a minimum requirement the business chosen must have:

- a marketing department
- a number of other functional areas.

Candidates are expected to look at the current product-portfolio of their selected business and choose an appropriate **new** product or service. They must not re-launch an existing product currently sold by their selected business, or outline how the selected business currently markets one of its products. However, the product/service does not have to be a new invention – just new to the selected business.

Candidates will then be required to undertake detailed market research in order to create their marketing proposal which will be the centrepiece of their presentation to an informed audience. The candidate must inform the audience of how they have arrived at their suggested marketing mix, how it fits into the framework of their chosen business, how it meets the objectives they laid down at the outset and how the functional areas of the selected business will support the proposed marketing mix.

Delivery plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve a unit. Delivery ideas are presented in the notes in the next section.

Topic	Content Delivery	AOs	Delivery Ideas	No. of Hours
What is marketing?	Look at the definition of marketing and all the different types of marketing that we are faced with every day.	Candidate work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding	Page 18	1
Marketing objectives	Look at general aims and objectives. Looking at specific aims and objectives of different types of businesses Look at marketing objectives. Why are they needed? How do they fit in with the main objectives of the business?		Page 18	2
Functional areas. How they support marketing activity	Reference to work covered in introductory programme. Look at interdependence of different departments. How do these functional areas support marketing activity?		Page 19	2
The marketing mix	What are the main parts of the marketing mix? Look at ways current products/services are marketed in relation to price, promotion etc.		Page 19	2
Task One	See Assignment Brief	AO1	Page 19 Assignment Brief page 23	5

Topic	Content Delivery	AOs	Delivery Ideas	No. of Hours
Scene setting	Discuss with group and individual candidates their choice of business. What methods are needed to gain access to the information they need?	In this section the work the candidate completes can provide further depth to AO1	Page 19	2
Task Two	See Assignment Brief		Page 20 Assignment Brief Page 23	3
Planning market research	Reference to how research must be effectively planned . Objective setting, timescales, informing an outcome ie the marketing proposal.		Page 20	4
Secondary research into selected business	What is secondary research? Give candidates an exercise to complete using the Internet to establish some facts and figures.		Page 20	3
What is primary market research?	Look at the different methods of market research available, different sampling techniques and good questionnaire design. Candidates to design a simple questionnaire as practice.		Page 20	3

Topic	Content Delivery	AOs	Delivery Ideas	No. of Hours
Market research	Look at ways of analysing data through the use of different analytical techniques as well as how to present data effectively. A series of class exercises will help to develop a candidates understanding in this area.		Page 21	6
Task Three	See Assignment Brief	AO3	Page 21 Assignment Brief page 23	8
Designing the presentation (content)	Revise the concepts of the marketing mix covered in Work Assignment Brief 1. Illustrate to candidates how they can link their research and analysis to the formulation of their marketing mix.		Page 21	3
Designing the presentation (skills)	What makes a good presentation? Pitfalls to avoid. Eye contact . What is it? Don’t read from your script. Do I use PowerPoint slides or OHTs? Practice presentation skills . simple scenarios on things that the candidates have a detailed knowledge of.		Page 21	4
Designing the presentation - a dummy run	Candidates will give a run through of their presentation to four or five colleagues who will give feedback on content, presentation slides, pace of delivery, handouts etc. Candidates can then make any necessary changes to their work prior to their actual presentation to an informed audience		Page 22	3
Task Four	See Assignment Brief	AO2	Page 22 Assignment Brief Page 24	3

Topic	Content Delivery	AOs	Delivery Ideas	No. of Hours
Evaluation	How do businesses judge the success of their marketing campaigns? Identify how the bullet points in the What You Need to Learn section could be covered.		Page 22	2
Task Five	See Assignment Brief	AO4	Page 22 Assignment Brief page 24	4

Evidence requirements have now been met for Unit 1.

Delivery ideas

General Information

Candidates are going to need extensive access to the marketing department of their chosen business. They are unlikely to obtain all the information they need from a business's website.

Centres could make links with a business in their area and arrange a visit to the business or have a guest speaker from the business. It is quite acceptable for candidates to use the same business but all their work must be original.

What is Marketing?

A definition of marketing is often a good starting point for this unit.

You could illustrate the use of marketing by using current marketing campaigns as examples eg leaflets, magazine advertisements, and television advertisements.

A fun exercise is to get candidates to recite words from recent popular television adverts to see if the class can guess what advert they are discussing.

Another fun exercise is to get students to draw the brand logos of popular brands. It is surprising how many they know!

Marketing Objectives

Within the introductory programme candidates looked at the general aims and objectives of business. This section must be revised.

Candidates will need to understand that the general aims and objectives of the business will be directly linked to the marketing objectives of their chosen business.

A possible exercise is to get candidates to research recent large advertising campaigns, to see if they can find the marketing objectives of the chosen business.

Candidates could also look at the marketing objectives of their school/college to see how these are directly linked to the overall aims and objectives of the school/college.

Functional Areas - How They Support Marketing Activity

Within the introductory programme candidates investigated the different functional areas found within businesses. This theory needs to be developed. Candidates need to be aware that all functional areas are interlinked and do not work in isolation of one another.

The marketing functional area needs advice and support from the other functional areas in the business.

A useful exercise to undertake with the candidates is to look at how the school/college markets itself. Does the school/college have its own marketing functional area? Get the candidates to consider how many people the marketing functional area liaises with during one of its major marketing projects for example open days.

The Marketing Mix

Candidates need to gain an understanding of the main parts of the marketing mix.

It might help them if they looked at a similar range of products/services within the product portfolio range of a number of different businesses. Candidates could then look, for example, at the promotional mechanisms used by different businesses to ensure that a consumer knows that their product exists.

Task One

Task one gets candidates to cover all of the above points in theory. At this stage this evidence will not need to be applied to their chosen business. However, candidates will develop the overall depth of their evidence if they are encouraged to use generic examples from a range of different businesses throughout this task. It is imperative that candidates do not simply regurgitate material lifted straight from a text book or written straight from the blackboard. They must show they understand the key unit themes for themselves.

Scene Setting

The choice of business is crucial if candidates are going to achieve top marks. If candidates are free to select their own business it is vital for teachers to spend some time checking they are going to be able to secure sufficient information. There is nothing worse than a candidate being half way through an assignment and then finding out they can not access sufficient information in order to achieve the higher level skills. In your role as a teacher you must spend some time showing candidates how best to make use of a visit to a business or their line of questioning if they are to enter into a meaningful dialogue with a business representative. This will help focus a candidates mind on what is required allowing them to be selective in the scene setting process.

Task Two

This task requires candidates to outline the following points in relation to their chosen vocational context:

- current marketing objectives
- current product-portfolio of the selected business
- current marketing mix
- how the business's functional areas work together in supporting marketing activity.

Candidates are then required to introduce their new product or service clearly explaining how this fits in with the selected businesses current marketing objectives and product portfolio. This overview must be concise and teachers must ensure that candidates are not containing large amounts of unnecessary and superfluous material.

Planning Market Research

At this point it is imperative that teachers spend some time looking at how research must be effectively planned by the candidate to ensure that they obtain a suitable outcome - ie information can be obtained from the market research to inform the creation of the marketing proposal. In your role as a teacher you need to spend time reinforcing the sections on page 15 of the specification highlighting these key considerations for candidates.

Secondary Research into Selected Business

Candidates are going to need to undertake some secondary research and therefore have to be familiar with different techniques.

A good way to introduce secondary research is to set an exercise which involves candidates searching the internet and text books for specific information. This exercise is also a good way to also introduce the candidates to reference the sources they have used.

What is Primary Market Research?

Candidates need to cover the different types of primary market research. They also need to cover how to undertake simple sampling techniques, and how to design an effective questionnaire.

Good market research is achieved when the candidate makes a clear plan about what they are aiming to achieve and find out. Without clear direction questionnaires are often ineffective and will fail to supply the candidate with the information needed to compile their marketing mix.

Candidates could trial their questionnaires on their fellow candidates to see if they obtain the information required to design an informed marketing mix for their new product or service.

Market Research

Candidates need to understand how to analyse different forms of market research using a variety of analytical techniques as provided on page 16 of the specification. They also need to become familiar with the different methods of presenting market research data using diagrams as well as text based evidence. It is important that in your role as teacher you spend some time on these two issues - in all of the other AS units candidates will need to demonstrate these two skills so any early help and guidance can only benefit candidates in the long term.

Task Three

The candidate must now plan for and carry out their research in relation to their chosen new product or service. The first section of this task guides candidates to consider the process they need to go through prior to beginning their research and reinforces much of what will have been covered in your teaching. Candidates then compile questionnaires, run focus groups etc and look at the wider picture through secondary research.

The more detailed the candidate's research, the more information they will have available to create their marketing mix and they will therefore be able to achieve the higher marks.

The second part of the task focuses on candidates presenting the findings of and analysing their market research. The analysis of their research will feed into their marketing mix which will be presented to an informed audience.

Designing the Presentation (Content)

In your role as teacher you should now work through how an effective presentation is constructed in terms of the material that is to be used. You may want to again revisit more generally the themes of:

- marketing objectives
- marketing mix.

Candidates must be reminded that they need to link their own ideas to their market research and not just pluck unsubstantiated ideas out of the air.

The aim of this section is for you to give candidates some guidance on how to use their analysis of statistical data. It should also focus on informing candidates of the best ways to present the results of primary and secondary research for the purposes of a presentation.

Designing the Presentation (Skills)

It is important that candidates are taught what makes a good or bad presentation. A lot of candidates find presentations rather daunting and therefore as much support as possible is important this early on in the course.

A good way to illustrate a poor presentation is to physically do one in front of the class. Use an overhead that is overcrowded, font far too small, read from your script at high speed and make no eye contact with the class. Then ask them what they have learnt.

Teach candidates that this is their stage and whilst performing a successful presentation they must move around it, take things slowly and a well rehearsed presentation will work and gain them maximum marks.

Designing the Presentation - a Dummy Run

It is important that you allow candidates to practice their presentation on their fellow candidates. They can then receive feedback and will ensure that candidates have had at least one practice prior to the final presentation.

Task Four

This is the final presentation for the candidate as they deliver their marketing proposal to an informed audience. In your role as teacher you will be required to complete a detailed witness statement outlining the content and delivery style of the candidate's presentation. This should be a thorough document and one has been provided for you on page 140 of the Specification to serve as a useful template.

Evaluation

Time needs to be spent with candidates looking at the different ways businesses assess the success of their marketing campaigns.

Case studies could be used to analyse the actual success of marketing campaigns. It would be useful for candidates to look at both successful and unsuccessful campaigns.

Task Five

This task can either be included in the candidate's presentation or as a separate piece of work.

If candidates choose to include this within their presentation there must be clear evidence of the content of Assessment Objective Four having been fully covered. This could be included within the candidate's presentation slides and a detailed witness statement from the assessor.

Assignment brief

You have applied for your first job as a marketing assistant for a large/medium sized business. The company has informed you that you have reached the interview stage. As part of the interview you have been asked to given a presentation on a suitable marketing mix for a new product/service you think the business could launch in the near future. This is to be backed up with an understanding of the marketing objectives of the business, detailed market research and an in-depth knowledge of how all the functional areas within the business work together to support the marketing department.

You have sought the help of your tutor who has advised you to work your way through the following tasks in order to prepare yourself for this rather complex interview.

Task One (AO1)

Your first task is to be establish what the following terms and definitions mean and how they affect businesses generally.

- What are marketing objectives?
- The role functional areas play in supporting marketing activity.
- What is the marketing mix?

You have decided to compile a report which outlines the above points.

Task Two (AO1)

The next stage is to provide an overview of your chosen business. You need to establish the following points:

- Current marketing objectives
- Current product-portfolio of their selected business
- Current marketing mix
- How the selected businesses departments work together in supporting marketing activity.

Write an introduction into your chosen business which includes all the above points. This will provide an additional opportunity for you to demonstrate the depth of your knowledge and understanding.

At this stage you are advised to introduce your selected new product or service stating how this fits in with the selected businesses current marketing objectives and product portfolio.

Task Three (AO3)

You are now required to undertake and analyse the results of primary and secondary market research which will inform your marketing proposal for your new product/service. In order to achieve the best results you need to go through the following stages:

- Clearly set objectives for your market research
- Identify who the potential customers are and their requirements

- Identify possible sources of information, both primary and secondary
- Decide which methods of research to use to collect the information required
- Estimate and set a timescale for the completion of the market research.

When you have undertaken your market research analyse your results using a variety of analytical techniques as outlined below. Present your results in a suitable format.

- Mean
- Median
- Mode
- Percentages
- forecasting.

Task Four (AO2)

Using the results of your investigation into your chosen business and analysis of your primary and secondary research, prepare the following for inclusion in your presentation:

- your marketing objectives for the new product or service
- the marketing mix for your new product or service.

Task Five (AO4)

You are required to make reasoned judgements to the likely success of your marketing proposal. In order to do this you must consider the following points:

- Whether the marketing objectives are likely to be fulfilled
- Whether the needs of the potential customers are likely to be met
- Whether the proposal is sustainable over time, both in terms of its potential market position and actions of possible rival competitors
- How the new marketing proposal fits with the business's current product-portfolio
- The likely impact of the proposal on other functional areas of the business.

You may present this as a written piece of evidence separate from your presentation or you may wish to include this within your presentation.

Unit F241: Recruitment in the workplace

Introduction

The aim of this unit is to allow candidates to investigate, undertake and understand some of the primary roles and functions inherent in the work of a human-resource department in a medium to large-sized business.

In order to evidence the unit, candidates will produce a report showing how they have set about recruiting and selecting an individual for a particular job-role. They will also produce an induction and motivational programme for their chosen job role.

Candidates will be expected to support one another by taking on the role of prospective employees, applying for positions and participating in the recruitment and selection processes for advertised positions. Candidates will only be assessed on the selection processes they put in place in relation to their chosen job-role. They will not be assessed when acting as an interviewee for other candidates.

Candidates will need to know and understand:

- job roles
- the recruitment process
- the selection process
- the induction process
- employee motivation
- the legal dimension
- research
- how to judge effectiveness

Candidates need to choose, at the outset, an appropriate business to investigate. A medium to large-sized business in the local area, with a functioning human-resource department that is capable of advertising a number of different job-roles at different levels, would be an ideal choice. Assessors need to take the lead in choosing the business, at the outset of the unit, for candidates. It is imperative that you identify a number of job-roles within the business chosen, before dividing your class into groups and assigning each group a particular job-role.

Delivery Plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve this unit. Delivery ideas are presented in the notes following the table.

Topic	Content	AOs	Delivery Ideas	No. of Hours
Recruitment and selection	Why is an effective recruitment and selection process important in business? Investigate the recruitment and selection process (as well as provide information on induction and employee motivation). The legal framework to cover Sex Discrimination Act 1975, Race Relations Act 1976 and Disability Discrimination Act 1995/2004.	Candidate work generated from class exercises on this theme can be used to demonstrate a level of knowledge and understanding.	Page 28	5
Task One	See Assignment Brief	AO1	Page 29 Assignment Brief Page 31	4
Scene setting	Discuss with groups their choice of business and job role to which the group has been assigned		Page 29	3
Task Two	See Assignment Brief	In this section the work the candidate completes can provide further depth to AO1	Page 29 Assignment Brief Page 32	3

Topic	Content	AOs	Delivery Ideas	No of Hours
Research methodology	Look at what research the candidates will need to undertake to carry out an effective recruitment and selection process.		Page 29	4
Documentation	Look at all of the documentation that candidates will need to produce in the course of their recruitment and selection process. Use case studies/the Internet to access this documentation. Discuss ways that the documentation could be analysed to ensure it is fit for purpose and effective material is produced for the candidate's recruitment and selection process.		Page 29	5
Interview techniques	What is the purpose of an interview? What makes a good versus a bad interview? Interviewer techniques What can you do and not do as governed by equal opportunities? Good questions Candidates to conduct some mock interviews in small groups.		Page 29	2
Task Three	See Assignment Brief	AO3 AO2	Page 30 Assignment Brief Page 32	8

Topic	Content	AOS	Delivery Ideas	No of Hours
Revision of induction programme and motivational package	Look at and discuss the relative merits of induction programs used by other businesses. Look at and discuss the different types of motivational packages that businesses can offer their employees. Candidates need to be aware that these are often related to the seniority of the post.		Page 30	3
Task Four	See Assignment Brief	AO3 AO2	Page 30 Assignment Brief 34 Page 10	5
Evaluation reflection	How does one evaluate the effectiveness of a recruitment and selection process? Identify how the bullet points in the specification page 21 could be covered.		Page 31	4
Task Five	See Assignment Brief	AO4	Page 31 Assignment Brief Page 34	4

Evidence requirements have now been met for Unit 2.

Delivery Ideas

Recruitment and Selection

This section is a general introduction to recruitment and selection. Candidates need to be aware of why it is important that businesses make the right choice when recruiting new staff.

Introduce induction programmes. Candidates have often been through an induction programme at school/college or as part of a part time job. This is often a good start point when discussing this area.

A useful exercise is to get the candidates to draft out a new induction programme for this course.

Candidates need to look at the theories of motivation and the idea of payment and non-payment motivators.

The final part of this section looks at the legal implications of the Sex Discrimination Act 1975, Race Relations Act 1976 and the Disability Discrimination Act 1995/2004 and The Employment Equality (Age) Regulations 2006

Role plays are often a good way to get candidates to illustrate they understand equal opportunity legislation. This can also provide a fun activity.

Task One

It is important candidates get an overview of the process from start to finish. Flowcharts and other visual aids with supporting explanation might be a good way for candidates to demonstrate their knowledge and understanding of the key stages in the human resources process. In terms of legislation spider diagrams could be a way for candidates to demonstrate their knowledge and understanding put a law in the centre of the page in a central bubble and then have arrows going out to outer bubbles which contain key features of the legislation and how it impacts on the recruitment and selection process. The emphasis should be on imaginative/innovative ways of presenting evidence.

Scene Setting and Task Two

Encourage candidates to introduce their chosen business and job role writing in a concise manner. At this point candidates can further develop their understanding of the human resources process using their chosen business as a context but this is not compulsory. Any evidence provided should be informative and to the point.

Research Methodology/Documentation and Interview Techniques

Candidates need to have a detailed understanding of the paperwork that drives the recruitment and selection process.

Examples of many of these documents can be found on the Internet.

Having looked at a wide range of different recruitment and selection documents from a variety of different businesses candidates should analyse them in terms of:

- fitness for purpose
- Do they meet the legal framework which covers all human resource activity?

In your role as teacher you may want to discuss different ranking systems with the class so that effective documentation can be produced from the analysis undertaken. However, if ranking systems are used as part of the analysis they must be fully explained. For example what factors have to be present to make a document worth the top mark of 5?

Candidates should be aware of what makes a good and bad interviewer. There are lots of videos available to illustrate these points. However, another way is to act out a role play where you are a very bad interviewer and one of the candidates takes on the role of interviewee.

Get candidates to start interviewing one another in small groups so that they can find out the pitfalls of interviewing prior to organising their main interviews.

Prior to the interviews it is a good idea to get all the candidates in the group to practice their interview questions and procedures out on one another. They will soon discover which questions do not work and become more familiar with the material they are using.

Task Three

This can be split into two parts as indicated in the assignment brief.

Candidates are now working in a group to prepare all the documentation needed in order to run their own interviews. This part of the unit will be a logistical challenge and you need to ensure that candidates hold meetings to enable them to decide on the final documentation that is to be used. You may want to sit in on some of the meetings and even invite a HR consultant to do the same to bring an added vocational flavour to proceedings.

Although candidates are working in a group they will need to show evidence of their own individual work

In this part candidates are conducting the interviews. They will need a suitable room to conduct their interviews.

After the interview candidates have to choose the successful candidate and notify the successful and the unsuccessful candidates of their decision.

Remind candidates that they have to act as an interviewee for other members of the class and this must be taken seriously at all times.   The candidate's recruitment documentation relevant to the post(s) advertised by their group peers will also form part of AO2. Please see page 19 of the specification.

Revision of Induction Programme and Motivational Package

If some of the group have been through an induction programme it is useful to get them to relay their experience to the group.

A good way to look at motivation is to get the candidates to identify what motivates them and how they like to work and be managed, within the workplace. Candidates could also discuss the type of motivational package they are currently receiving if in part time employment.

Revise the type of packages that businesses can offer employees in order to motivate them.

Task Four

Candidates now need to produce their own induction programme and motivational package for the successful applicant.

This section can also be started as group work with all members sharing their ideas and thoughts. However, it must be written up individually.

Evaluation, Reflection

In your role as a teacher you may want to complete a witness statement for each group member as you sit in on the interviews. You may want to get other class peers to carry out a similar role if they sit in on the interviews in an observer role. The witness statements can then form part of the candidate's own evaluation and that of the overall group's performance - some time could be spent holding a discussion at the end of the process when there is an opportunity for reflection.

Task Five

Candidates are now evaluating their recruitment and selection procedures, induction programme and motivational package. Group discussions, one to one dialogues between teacher and candidate could all enhance this section. Guidance has been provided in the specification on page 21. The bullet points found within the section 'How to judge effectiveness' should help candidates to structure their evidence.

Assignment Brief

As an employee in the Human Resource department of a medium to large-sized business, you have been asked to assist in the recruitment and selection of an individual for a particular job-role, and produce an appropriate induction and motivational package for the successful applicant.

You need to produce a report, with supporting documentation, on how you approached this human-resource activity.

Task One (AO1)

In order to assist in the recruitment and selection process you will need to identify and explain the theory behind the following:

- The recruitment and selection process
- What is an induction programme? Why do businesses have an induction process? What usually happens during an induction programme?
- What factors are used to motivate employees?
- The legal dimension: Sex Discrimination Act 1975, Race Relations Act 1976, Disability Discrimination Act 1995/2004 and The Employment Equality (Age) Regulations 2006.

This information can form the introduction section of your report.

Task Two (AO1)

The second section of your report needs to focus on your chosen business. You will need to investigate and explain the following areas:

- Introduce your chosen business

- Describe the current jobs available within your selected business and identify the job role that has been chosen for your group activity.

To increase the breadth and depth of your knowledge and understanding of the unit themes (AO1) you may then wish to provide further evidence under the following themes. (Please ensure these sections if used are concise and to the point.):

- What recruitment and selection processes does the business currently use?

- What is its current induction programme? (also links to AO3)

- How does it motivate its employees? What motivational package(s) does it offer employees? (also links to AO3).

Please ensure, however, that once you begin your own recruitment and selection process for your assigned job role you do not simply explain what your business currently does in terms of existing procedures. You must look to analyse other approaches that other businesses have taken with regard to recruitment etc with a view to ensuring your own recruitment and selection process is as effective as possible.

Task Three (AO3 AO2)

Part 1

You are now ready to start working in a group preparing and carrying out the recruitment and selection package for your selected business and job role.

Although the preparation for this section is undertaken as a group you must show evidence of your own contribution and write up any findings individually.

As a group work through the following stages:

- Hold a group meeting to decide the job role that you are going to interview potential candidates for. Discuss where this job role should be advertised, the skills and qualities and qualifications potential applicants will need. You will also need to decide the exact nature of the tasks that the new employee will be expected to undertake.

- Following the group discussion above, each member of the group is required to prepare rough drafts of the following documents:

    - an advertisement

    - a personal specification

- a job description
- ideas about how potential applicants should apply with supporting documentation, eg a draft application form
- letters inviting candidates to interview
- interview documentation
- interview tasks
- letters to inform successful/unsuccessful applicants.

To help you produce these documents you need to analyse other business documents and use any examples of good practice when designing your own. There must be evidence of this analytical process in your work as you question whether documents are fit for purpose and whether they meet the legal framework that covers all human resources activity. Ranking systems might be one way of demonstrating this analytical process.

- Hold a second group meeting. Each member of the group should bring their own draft copies of their documents created above. The group then decide on the final version of the documentation that is to be used.

  Having decided upon your final documents, describe in your own words how and why the group decided on the final versions.

- Plan the interview. The group needs to consider the following points:
  - short listing procedures
  - letters of invitation to be sent to successful applicants
  - documents to be used to judge performance of applicants
  - questions to be asked
  - possible scenarios candidates could be asked
  - how is the panel going to work: who will ask what questions, who is going to welcome the candidate to the interview etc
  - lay out of the interview room
  - dress code for the panel
  - answers to possible questions the applicants may ask the panel.

Part 2

- Conduct the interviews using the interview documentation that has been created. This will help the group make an informed judgement at the end of the process

- After the interview process the panel needs to decide on who was the successful applicant. You will need to inform successful and unsuccessful candidates using template letters you have already designed.

You will also be required at this stage to act as a potential applicant for your fellow class peers by applying for and attending a series of interviews for a number of advertised positions. Do take this role seriously. Remember you need your class peers as much as they need you. **The documentation that you complete to apply for positions as advertised by your class peers should be included as part of an appendices within your final portfolio.**

Task Four (AO3 AO2)

Having selected your new employee the group must decide upon a suitable induction programme and motivational package for the successful applicant.

Again carry out research individually into different forms of induction training that businesses use as well as ways that a business can motivate its workforce.

Take your findings to a group discussion and decide what you all think should be included in the final documents.

Individually write up your ideas for the induction programme and motivational package. Making clear reference to your original research, clearly state how this has influenced your induction programme and motivational package.

Task Five (AO4)

The final part of your report must make judgements about the effectiveness of your recruitment and selection processes, and the induction and motivational package you developed.

You need to evaluate how successfully each stage of the process met the needs of your chosen job-role and successful applicant. You need to consider these issues in the context of whether:

- the human-resource documentation was fit for purpose and likely to produce the end result you were looking for

- your procedures fitted the legal framework within which human-resource activity is expected to take place

- your research was wide-ranging enough to inform the development and construction of your documentation

- there are any aspects of your chosen approaches that you would change should the activity be repeated

- there are any aspects of your chosen approaches that you would change should a different job-role be chosen.

Unit F244: ICT provision in a business

Introduction

The aim of this unit is to give candidates an insight into the impact that ICT can have on a business and its implications for both business and people responsible for using ICT.

In order to evidence the unit, candidates will explore ICT provision in a business through an investigation into either a business that is about to start up and so needs ICT provision to be introduced, or a business that is looking to improve and update its current **limited** ICT provision. Candidates will produce an ICT proposal showing how they would introduce, or update the ICT provision in their chosen business. The proposal will be presented to an informed audience in the form of an oral presentation.

In order to produce a realistic and appropriate proposal candidates must ensure that their research takes into account as many different perspectives as possible. Candidates need to be able to gather information on the needs of the business, the needs of individual functional areas and the needs of individual employees for their proposal. They need to carry out both primary and secondary research.

The lynch pin for this unit is the choice of an appropriate business. A business that is about to start up with a number of different departments or a business that is looking to improve and update its current limited ICT provision would be an ideal choice. Candidates must not select a business that already has made a considerable investment into ICT. The use of the candidate's school as the selected business will not allow the candidate to meet the requirements of this unit. Candidates need to get to grips with the needs of their business, interview employees of the business and look at the various activities and subsequent needs of different departments when producing their ICT proposal. They must not simply structure their ICT proposal around a business that already has excellent, comprehensive ICT provision.

Candidates will need to know and understand:

- how ICT is used by businesses
- forms ICT can take
- benefits/drawbacks of introducing ICT provision
- contingency planning
- research
- presentational skills
- how to judge viability.

Delivery Plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve a unit. Delivery ideas are presented in the notes in the next section.

Topic	Content Delivery	AOs	Delivery Ideas	No. of Hours
ICT provision	Look at the possible uses of ICT by a business. Look at the various forms ICT provision can take. Look at potential drawbacks and benefits of introducing ICT. Look at contingency planning to minimize the negative impacts of introducing/updating ICT.	Candidate work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding	Page 39	7
Task 1	See Assignment Brief	AO1	Page 39 Assignment Brief Page 42	5
Scene setting	Candidates to write a short introduction into their chosen business outlining contacts and present state of ICT provision. One to one discussion with candidates to agree suitability of selected business.	In this section the work the candidate completes can provide further depth to AO1	Page 39	2
Task 2	See Assignment Brief	AO1	Page 39 Assignment Brief Page 42	3

Topic	Content Delivery	AOs	Delivery ideas	No of hours
Planning of market research	Reference to how research must be effectively planned. objective setting, timescales, informing an outcome ie the ICT proposal.		Page 39	4
Research techniques	Primary and secondary research techniques. Look at different types of research techniques that could be available. Look at how to write a good questionnaire		Page 39	6
Analysis	Look at ways of analysing data through the use of different analytical techniques as well as how to present data effectively. A series of class exercises will help to develop a candidates understanding in this area.		Page 39	6
Task 3	See Assignment Brief	AO3	Page 40 Assignment Brief Page 42	8
Designing the presentation (content)	Revise what criteria candidates have for their ICT proposal. This could involve one to one work with individual candidates and might be best linked with candidates starting Task 4.		Page 40	3

Topic	Content Delivery	AOs	Delivery Ideas	No of Hours
Designing the presentation (skills)	What makes a good presentation? Pitfalls to avoid. Eye contact - what is it? Dont read from your script. Do I use PowerPoint slides or OHTs? Practice presentation skills. Simple scenarios on things that the candidates have a detailed knowledge of.		Page 40	4
Designing the presentation – a dummy run	Candidates will give a run through of their presentation to four or five colleagues who will give feedback on content, presentation slides, pace of delivery, handouts etc. Candidates can then make any necessary changes to their work prior to their actual presentation to an informed audience		Page 41	3
Task 4	See assignment brief	AO2	Page 41 Assignment Brief page 43	3
Reasoned judgments	Investigate with candidates how they could judge the likely success of their ICT proposal. Explain the criteria they should be using to judge their proposals		Page 41	2
Task 5	See assignment brief	A04	Page 41 Assignment Brief page 43	4
Evidence requirements have now been met for unit 5.				

Delivery ideas

ICT Provision

Candidates need to be aware of how ICT can be used within different business contexts. They will also need to be aware of the various forms ICT provision can take.

A good starting point could be to look at how the centre makes operational use of ICT. Candidates could also interview administrative members of staff to gauge their feelings about their involvement with ICT. These discussions may also help candidates identify what the negative impacts of ICT are and how these can be minimised.

Task One

This task constitutes the general theory for the unit.

Scene Setting and Task Two

Candidates need to compile a short introduction to their business clearly stating contacts and present state of ICT provision within the business. Candidates should also be able to describe what the business hopes to achieve through the introduction of, or updating of their, ICT provision.

Teachers need to ensure that the chosen business is suitable and will enable the candidate to achieve all of the assessment objectives.

It is quite acceptable for all candidates to use the same business based on an educational visit or speaker but work must be completed individually.

Planning of Market Research

The first stage of research is for candidates to outline their research objectives. This will help them devise their research material and will allow them to collect appropriate, realistic and up-to-date information which will inform the ICT proposal.

Research Techniques

In order to gain sufficient information from their selected business candidates are required to carry out primary and secondary research.

They will need to know how to compile an accurate questionnaire in order to gain the correct information to feed into their ICT proposal.

Research techniques may have been covered in other units however, some time revising the concepts may be useful.

Analysis

Candidates may need help in how to interpret and analyse results and guidance on how data should be presented before they investigate their own vocational context.

This section may need one to one assistance with individual students especially if they have all investigated different businesses.

Task Three

Having been briefed on types of possible research and possible analytical techniques candidates are free to investigate their own chosen business. It may be that teachers at this point provide one to one assistance to individual candidates. Teachers need to monitor candidates. research techniques carefully to ensure it is clearly focused on informing the ICT proposal. Teachers should also encourage candidates to present their data in different ways using tables, charts and diagrams as and when appropriate.

Designing the Presentation (Content)

In your role as teacher you should now work through how an effective presentation is constructed in terms of the material that is to be used.

Candidates must be reminded that they need to link their own ideas to their market research and not just .pluck. unsubstantiated ideas out of the air.

The aim of this section is for you to give candidates some guidance on how to use their analysis. It should also focus on informing candidates of the best ways to present the results of primary and secondary research for the purposes of a presentation.

Designing the Presentation (Skills)

It is important that candidates are taught what makes a good or bad presentation. A lot of candidates find presentations rather daunting and therefore as much support as possible is important so early on in the course.

When preparing the presentation it is important that candidates are reminded that their recommendations must be backed up by their research and analysis of the collected data. This approach will ensure candidates access the higher mark bands.

A good way to illustrate a poor presentation is to physically do one in front of the class. Use an overhead that is overcrowded, font far too small, read from your script at high speed and make no eye contact with the class. Then ask them what they have learnt.

Teach candidates that this is their stage and whilst performing a successful presentation they must move around it, take things slowly and a well rehearsed presentation will work and gain them maximum marks.

Do not rush this part of the unit; preparation is crucial and working on some generic techniques with candidates will help them to do well in the final presentation.

Designing the Presentation - a Dummy Run

It is important that you allow candidates to practice their presentation on their fellow candidates. They can then receive feedback and will ensure that candidates have had at least one practice prior to the final presentation.

Task Four

This is the final presentation for the candidate as they deliver their ICT proposal to an informed audience. In your role as teacher you will be required to complete a detailed witness statement outlining the content and delivery style of the candidate's presentation. This should be a thorough document and one has been provided for you on page 142 of the Specification.

Reasoned Judgements

Having formulated their ICT proposal candidates are now required to make judgements about how successful they think their ICT proposal will be.

They have been given guidelines of what to consider within the assignment. These will help candidates focus their evidence.

Assessors are advised to discuss these points with the candidates to ensure they fully understand the skills required to achieve assessment objective four.

Assessment Objective four may be evidenced as part of the candidates presentation or as a separate piece of written evidence.

Task Five

Candidates are making judgements on the likely success of their ICT proposals. They should be encouraged to follow the bullet points as laid out on page 32 of the Specification under the heading 'How to judge viability'.

Assignment Brief

You will produce an ICT proposal showing how you would **either** introduce ICT provision to a start-up business **or** update ICT provision in a business that is looking to improve and update its current **limited** ICT provision.

Task One (AO1)

In order to produce your ICT proposal you will first need to develop your knowledge and understanding of a series of key unit themes:

- how ICT is used by businesses
- the forms ICT provision can take
- benefits/drawbacks of introducing/upgrading ICT
- contingency planning.

Task Two (AO1)

Before you carry out your research you need to introduce your chosen vocational context. In your brief overview you need to introduce your business and provide a brief overview of its structure and current level of ICT provision. It would be useful to explain at this stage what the selected business hopes to achieve through the development/introduction of ICT. How will this investment benefit the business?

Task Three (AO3)

In order to prepare your ICT proposal you are required to carry out detailed research into your chosen business. You are required to use both primary and secondary research to establish the following needs:

- of the business
- of the individual functional areas
- of individual employees.

A key focus of your proposal needs to be how the different departments of your chosen business would benefit from the introduction or development of ICT provision.

Your **primary** research could include:

- face to face discussions carried out with a speaker who has expertise in this area
- questionnaires, a survey carried out with staff at a number of levels within your chosen business.

Your **secondary** research could include information gathered from existing companies who already have established ICT provision.

In order to conduct successful market research you must ensure you carefully plan what information you are seeking and how this will inform your ICT proposal. Setting yourself objectives is a good way of keeping the focus of your research on the ICT proposal.

Having undertaken your research you are now required to analyse your results.

You need to present the findings of your research and are encouraged to use tables, charts and diagrams to illustrate the points being made.

The analysis of your results will feed into your ICT proposal and presentation. Prepare your analysis of results in a format suitable for use within your presentation.

Task Four (AO2)

Using the results of your investigation into your chosen business and analysis of results prepare your ICT proposal.

Your presentation must include the following points:

- how the ICT proposal fits within the framework of the chosen business

- how it meets the needs of the business

- how it meets the needs of the workforce

- how you have arrived at your ICT proposal . reference to your research and analysis of research.

A key focus of your proposal needs to be how the different departments of your chosen business would benefit from some sort of ICT provision.

Run through your presentation in front of a group of three of your class members and get feedback on the content, presentation slides, pace of delivery, handouts etc.

Use your class members. advice to make any changes necessary.

Present your presentation to your informed audience.

Task Five (AO4)

You are now required to make reasoned judgements to the likely success of your ICT proposal. In order to do this you must consider the following points:

- whether the negative impact of introducing your ICT provision will be outweighed by the positive gains to be made by the business

- what the implications are for the employees working in the business and whether they will be willing to embrace the changes

- whether the proposal will improve communication between different departments of your business, or in fact slow things down, especially in the early stages

- whether the proposal is financially and operationally sound.

You may present this as a written piece of evidence separate from your presentation or you may wish to include this within your presentation.

Unit F245: Running an enterprise activity

Introduction

In this unit candidates are required to organise and run, as part of a team, a profit-making enterprise of their choice. They will produce a report on their chosen activity.

They will need to know and understand:

- aims and objective setting
- building and developing an effective team
- managing time
- required resources
- the need for regular meetings
- possible constraints
- research and analysis
- potential future changes to the enterprise activity.

Candidates. reports need to contain evidence of their research and analysis as they investigate the success of their activity from a number of different perspectives. These will include:

- stakeholders views
- how the team interacted
- own contribution.

Candidates need to select a project that will enable them to make a profit so that monetary considerations can be brought into team discussions. Candidates need to be working as part of a team, and need to play a major role in the chosen activity. The activity needs to be large enough to achieve all the evidence requirements but not so big that candidates lose control of its organisation. The planning and organisation of the activity along with the dynamics of group working, is as important in terms of evidence produced as the actual running of the activity itself.

Candidates must be encouraged to keep copious notes throughout the whole process in order to compile sufficient evidence for their final report. Although working as part of a group, candidates will be required to produce independent evidence which clearly illustrates their role within the enterprise activity.

Delivery Plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve a unit. Delivery ideas are presented in the notes in the next section.

Topic	Content Delivery	AOs	Delivery Ideas	No of Hours
Compilation of a report	How to write a report and manage your file.		Page 48	1
Meetings	What is an agenda? How do you complete minutes? The diary		Page 48	2
Things to consider	Discuss with candidates the considerations that need to be taken into account when planning a profit making enterprise activity		Page 48	2
Choice	Discuss with groups their choice of enterprise activity ensuring it is fit for purpose.		Page 48	2
Task 1	See Assignment Brief	AO1	Page 49 Assignment Brief Page 52	4
Aims and objectives	Look at different enterprise activities and the aims and objectives they may have had. Use past examples of enterprise activities carried out in the school/college.		Page 49	2
Personal skills and attributes	Look at the variety of methods that will enable candidates to identify what skills and attributes they have.		Page 49	2
Task 2	See Assignment Brief	AO2	Page 49 Assignment Brief Page 53	5

Topic	Content Delivery	AOs	Delivery Ideas	No of Hours
Time management	Look at the different methods candidates can use to plan when tasks should be completed in order for the enterprise to run smoothly from start to finish.		Page 49	1
Resources	What different resources are needed?		Page 49	3
Forecast and final accounts	Look at the compilation of cashflow forecasts/statement and profit and loss forecasts/accounts.		Page 50	4
Constraints	What are the constraints the candidates should be thinking about and how could they affect the planning and running of the enterprise activities?		Page 50	3
Task Three	See Assignment Brief	AO2	Page 50 Assignment Brief Page 53	15
Surveys and questionnaires	Good questionnaire construction. How to conduct a survey. Which stakeholders to target. Again look at previous case study examples if possible.		Page 51	2
Task Four	See Assignment Brief	AO3	Page 51 Assignment Brief Page 54	6

Topic	Content Delivery	AOs	Delivery Ideas	No of hours
Review/ reflection	Go over how the candidates should evaluate the success of their activity and make possible recommendations if the activity were to be run again		Page 51	2
Task 5	See Assignment Brief	AO4	Page 51 Assignment Brief Page 56	4

Evidence requirements have now been met for Unit 6.

Delivery Ideas

General Information

Throughout this assignment candidates are working in small teams in order to run a profit-making enterprise. Although the majority of the work is group orientated individual candidates must produce their own written evidence.

Throughout the assignment candidates are required to complete a diary. This will help them reflect on the success of their enterprise activity and make realistic and justified recommendations for future improvements.

How the teams are organised is entirely up to the assessor. However, each team member must have a sufficiently large role in the organisation and running of the enterprise activity to enable them to achieve all of the assessment objectives.

Compilation of Report and Meetings

It is important before candidates get into the planning and running of the enterprise activity that you spend some time with them looking at ways in which they could compile their evidence and what role they are expected to perform in meetings. An emphasis must be placed on the need to work effectively as a team, to work for fellow class peers to ensure everybody can meet the evidence requirements for this unit. In terms of layout of evidence there will be a lot of different documents . minutes, diary, reports, questionnaires etc. You need to familiarise candidates with the use of appendices and comment on the need for organised evidence so one can pick up a candidates piece of work and view the enterprise activity from start to finish.

Things to Consider and Choice

In your role as teacher you now need to talk with candidates generally about the numerous considerations they must consider when running their enterprise activity. Have a brainstorming session where you take maybe an activity that has run in your centre in the past and discuss with candidates the numerous issues that need to be considered before the activity is planned and actually implemented. You then need to divide the class up into groups so that they proceed with their own enterprises.

Task One

This is where the group holds its first team meeting and decides on a number of things including the type of enterprise activity that will be chosen as well as a second brainstorming session on the considerations that need to be taken into account when running the groups profit making enterprise activity. The teacher may wish to sit in on this first meeting as it is important the right choice of enterprise is made which will meet the assessment evidence requirements for this unit . an incorrect choice will cause problems down the line so getting it right first time around must be the priority.

Aims and Objectives and Personal Skills and Attributes

In your role as teacher, introduce the idea of aims and objectives. It is often useful to use examples from well known businesses to illustrate the difference between the two.

Discuss general aims and objectives and how these can be achieved by different businesses.

Make sure that candidates are aware of a full range of aims and objectives and how these are often interlinked. Candidates will be expected to come up with more that one aim and objective for their enterprise activity. Aims and objectives must be SMART.

In terms of personal skills and attributes in your role as teacher you could get candidates to complete various questionnaires which discover their hidden skills. This could include Belbin assessments or general questionnaires which get candidates to investigate their own personal skills and abilities.

Task Two

The aim of this task is for the team to identify what tasks they need to undertake in order to run their enterprise activity successful. The team needs to think about the skills that will be required to complete each identified task. These skills can then relate back to individual skills the candidates have identified. Finally job roles and tasks can be allocated to individual team members. Groups also need to produce a series of aims and objectives for the chosen enterprise activity.

This task is fairly complicated and candidates should be encouraged to work through the task section by section.

Time Management

Candidates will be required to show detailed planning of their activity. The team will have to identify when tasks need to be completed by and by whom. This can be illustrated through the use of timelines, Gantt charts, and ICT packages. Examples of timelines etc will help the teams plan how they will present their evidence.

Resources

Candidates will need to consider the different resources they will require in order to run their enterprise activity. Resources should include:

- human
- time
- physical
- financial.

A simple practice exercise is to get the candidates to plan a .celebration party.. Get them to consider all of the above points.

Forecast and Final Accounts

Candidates need to understand the financial documentation they will need to construct for their enterprise activity. They need to be aware of the distinct difference between financial forecasting (preparing a cashflow and profit and loss forecast) and the financial documentation needed on completion of the enterprise activity (cash statement and profit and loss account).

Constraints

Candidates need to be aware that they will have to manage constraints as they proceed through their planning and running of the enterprise activity.

Task Three

This is a comprehensive activity as candidates put together their plan of action. This will clearly outline what needs to be done, by when and by whom. The evidence will be in depth and will cover resources, financial documentation and how the negative consequences of constraints are to be minimised. Candidates should also consider time implications and make use of timelines and Gantt charts where possible. Given the amount of material to cover, it may help candidates to work through the work assignment as it is structured and takes them through each of the required themes.

Meetings will no doubt take place on a number of occasions to discuss the many issues that arise. Although much of the discussions will take place at group level it is still the responsibility of the candidate to produce individual/authentic evidence. Candidates can of course produce evidence of the different roles they performed as well as the tasks they were assigned to (the diary should show this input) but also accounts of any final decisions etc related to aspects of the activity should also be included especially if problems were encountered and procedures needed to be reviewed.

Surveys and Questionnaires

Candidates will need to put in place systems whereby they can find out what their customers thought of their enterprise activity. They will also need to reflect on their own contribution to the team, and the contribution of other team members.

By completing questionnaires on their own performance and that of other team members they are able to formulate ideas for their last team meeting.

The discussions should be constructive with advice and guidance enabling other team members to improve their own performance should they participate in a team activity in the future.

Candidates need to think carefully about the information they wish to gain from their questionnaires whilst at the design stage.

Candidates will need to use this research when they evaluate the success of their enterprise activity and also to justify their recommendations.

The enterprise activity now takes place.

Task Four

This is an important activity and focuses around a candidates ability to analyse their enterprise from a number of different perspectives. Candidates need to take on full responsibility for this task not leaving it for class peers to gather the necessary information. A questionnaire is one way in which candidates can tap into stakeholder views on their enterprise but other more varied methods of data collection would be encouraged.

Review/Reflection

Candidates will need to carry out a form of self-evaluation in relation to their chosen enterprise activity which, in your role as teacher, needs to be handled carefully. The point of this final section is not to provoke undue criticism and arguments amongst different class groups . instead it is to look at ways that the group could improve its enterprise activity should it be run a second time. The role of the individual in the group is of course important but many other factors come into play . resources, time, planning and adherence to aims and objects etc. Time should be spent talking about these themes generally before the group holds its final review meeting.

Task Five

This task allows the team to meet together to discuss their evaluations. The discussion should focus on the points outlined in the work assignment as well as any other relevant issues.

One important form of evaluation may be to look at the cashflow forecasts and profit and loss estimates carried out when planning the activity and then compare them to the final outcomes once the activity has actually taken place. Were there reasons for this? If profit was not generated, why not? Etc.

Using the evaluation the team should be able to make some recommendations for improvements that can be made to the planning and running of their enterprise activity.

Having held the team discussion candidates need to write up the evaluations and justified recommendations for improvement independently. This forms the final part of the report.

Assignment Brief

In order to complete this unit you will be working as part of a team. It is very important that throughout the whole assignment you .pull your weight, meet allocated deadlines and fully participate.

You will also need to keep a diary. This diary needs to contain the following information:

- details of all discussions that take place within the team as a whole
- details of all discussions with individual members of the team
- a record of all tasks you were allocated and have undertaken
- any problems and how they were overcome
- any successes and how these came about.

Throughout this assignment you will hold team meetings. These need to be supported by agendas and minutes. Allocate different team members to complete these throughout the assignment. Each team member must be responsible for the completion of these documents at least once.

Your diary will form an important part of your evidence and will help you make reasoned judgements concerning the success of your enterprise activity and how you could improve the performance of your team and your own contribution should the enterprise activity be run a second time.

Task One (AO1)

Prior to planning your enterprise activity you need to demonstrate a theoretical understanding of the following themes. Further development of each bullet point is found on pages 33-35 of the Specification.

- Setting aims and objectives
- Building and developing an effective team
- Time management
- Required resources

- The need for regular meetings
- Possible constraints.

Task Two (AO2)

Having completed the theory section the team can come together and decide on what type of profit making activity it will run.

Prior to your first team meeting each member must come up with one realistic idea for the enterprise.

Hold your first team meeting. Discuss all the different ideas. As a team decide on the enterprise activity that you will run with and ensure it is fit for purpose to meet the requirements of the assessment evidence grid.

Hold a brainstorming session to look at all of the considerations that need to be taken into account when planning your chosen profit making enterprise. You may want to discuss some of the themes as detailed on page 33-36 of the Specification.

Allocate a team member to type up the minutes of this first meeting.

Write up your diary. This will be your own personal account of the enterprise process and in it you should be looking to demonstrate your knowledge and understanding at this early stage of the considerations you need to think about when running your enterprise activity.

Task Three (AO2)

Hold the second team meeting.

You now need to discuss aims and objectives of your chosen enterprise activity as well as assign roles and tasks to the members of your group based on personal skills and attributes.

Prior to the second group meeting each member is to write out what they consider to be their personal skills and abilities. For example are you very organised, good with people, artistic etc.

Individually draft out an outline of what you consider needs to be done in order to run this enterprise activity successfully. Next to each task identify the skills that would be needed in order to complete the task successfully.

You need to bring these two documents to the second group meeting.

Discuss all the different outlines of what needs to be done in order to run the activity successfully.

As a team come up with an action plan which outlines the major tasks that need to be completed in order to run the activity successfully. Agree the skills and abilities that would be required to undertake each task.

Using each individual member’s own identification of their skills and abilities, allocate different team members job roles. These job roles should match the kind of activities that need to be completed and with the skills of different individuals.

Allocate a team member to type up the minutes of the second meeting, making clear reference to the how the final decisions were made.

Write up your personal diary. It may be that during this task as well as you demonstrating levels of application in this section showing how you dealt with aims and objectives, assigning roles and responsibilities and devising your action plan you will also add breadth and depth to your understanding of the key themes of this unit.

Task Four (AO3)

In order to meet the evidence requirements for this unit you will need to analyse the success of the enterprise activity. Each team member is required to draft out the following documents to establish feedback ensuring a number of different perspectives are taken into account:

- a questionnaire/survey for customers/participants in the enterprise activity
- a questionnaire which gets each individual team member to analyse how they personally contributed to the enterprise activity
- a questionnaire which each team member completes on every other team member of the group to analyse how they felt the other team members contributed to the enterprise activity.

Hold a further group meeting to decide which final versions of the four research documents you will use to evaluate the success of your enterprise activity as outlined above.

Write up your diary included your documentation and the agreed final versions.

Run the enterprise activity.

Hand out questionnaires/run focus groups to find out customers opinions of the product/service/activity.

Also at this point produce a series of financial data once the activity has run focusing on a cashflow statement and profit and loss account.

Complete the questionnaires on your own performance.

Complete the questionnaires on other team members.

Complete your own diary.

Time management

Create a plan which clearly outlines when each task will be completed by. This could take the form of:

- timelines
- Gantt charts
- Diary
- ICT packages.

Resources

The group must then consider the resources that they will need in order to run the enterprise successfully and profitably.

You need to consider the following points:

- Human who do you need to run the activity?
- Time a schedule to show where, and when resources will be allocated
- Physical the space to carry out the activity, equipment required, raw materials to be used, packaging, display units and marketing materials
- Financial the cost implications of running an activity - at this stage look at setting up cashflow forecasts and profit and loss forecasts for your chosen enterprise activity.

Constraints

Finally you need to think about the possible constraints that will impact on your activity and consider the following themes ensuring you carry out some form of contingency planning where possible in order to minimise any negative consequences.

- financial, eg budgetary constraints
- legal
- time
- skills
- equipment
- competition.

At this point allocate a team member to type up the minutes of the third meeting, making clear reference to the how the final decisions were made.

Write up your personal diary. It may be that during this task as well as you demonstrating levels of application in this section showing how you dealt with time issues, resources and possible constraints you will also add breadth and depth to your understanding of the key themes of this unit.

Action

Each team member should now be working on their allocated tasks remember that you still need to record problems and success in your diaries.

At the end of each week hold a team meeting to discuss any problems that have occurred and how you are going to overcome these problems. Also check the progress of all tasks. If a task has been delayed go back to your original plan and start rescheduling activities so that the enterprise is still able to start on time.

Allocate a different team member to take the minutes of every group meeting you hold.

Keep a note of all activities, decisions, changes to timelines etc in your diary.

Task Five (AO4)

The team must now hold its final meeting. The purpose of this meeting is to discuss and evaluate the success of the activity, and make recommendations for potential future changes if the team were to run the enterprise activity again. Use the following headings as guidance. Use the results from your completed questionnaires to make informed decisions.

- Was the activity a success?
- What did your customers think of the enterprise activity?
- Evaluation of my own contribution to the enterprise activity
- Evaluation of financial outcome
- Evaluation of other group members. Contribution to the enterprise activity.

Potential future changes to the enterprise activity could focus on the following points:

- whether there was a clear aim provided at the onset with objectives showing clearly how the group would work towards achieving this aim
- whether the enterprise was viable, should it have been reduced in scope to ensure that it could have been more easily managed
- whether a profit was made, if not, what measures could be put into place to ensure this happened in future
- whether the group interacted well, whether roles and responsibilities were clearly defined and whether everyone was working towards a common purpose.

Your diary will provide you with all the evidence that you need to complete this task. It should be an accurate record of exactly what went on and the problems and successes that you had throughout the process.

Unit F246: Financial providers and products

Introduction

In this unit candidates will look into all the different kinds of financial providers that are currently available and all the different products they offer.

Their evidence will be based on the following scenario:

> *As part of your work experience you have chosen to take a two-week placement with a leading financial provider. At the end of the first week you are given some information on a previous customer, both on a personal and business level. You have been asked to produce an appropriate financial package to meet your customer's specific needs.*

In order to complete the assignment candidates will need to use the vocational scenario provided by OCR which gives them a clear focus. Each year, one scenario will be released on OCR's website which will provide an authenticated vocational content for candidates' subsequent investigations.

The scenario will provide the candidates with a specific set of financial circumstances for a customer who is running their own business, either a new business or one that is looking to change direction, eg expanding, diversifying, down-sizing. The customer has a number of financial needs, both on a personal level and also in terms of their business.

Candidates will be required to research possible financial packages for their customer from the financial information provided for whom they are working, and from the wider financial-services industry. The candidates will analyse these and decide on the most appropriate package to meet the specific needs of their customer. They will produce a financial package for the customer that includes material informed by their research and which meets the specific needs of the customer on a personal and business level.

Candidates will need to know and understand:

- customers of financial services
- financial-service providers and products
- appropriate research into the financial-services market
- constraints affecting the provision of financial services
- potential effect of future changes to customer circumstances.

Delivery plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve a unit. Delivery ideas are presented in the notes in the next section.

Topic	Content Delivery	AOs	Delivery Ideas	No of hours
Overview of the financial services market	Provide an overview of the financial services market focusing on any changes and the different financial providers and products available.	Candidate work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding	Page 60	3
Why do people need financial services?	Look at why customers will need different financial services and products throughout their life.		Page 61	1
Why do businesses need financial services?	Look at why businesses will need different financial services and products at different stages of development.		Page 61	1
Constraints that impact on the provision of financial services	Look at different constraints which can affect the financial services/products individuals can access		Page 61	2
Task 1	See Assignment Brief	AO1	Page 61 Assignment Brief Page 63	5

Topic	Content Delivery	AOs	Delivery Ideas	No of hours
Scene setting. OCR scenario	Introduce candidates to the OCR scenario	In this section the work the candidate completes can provide further depth to AO1	Page 61	2
Task 2	See assignment brief		Page 61 Assignment brief Page 63	3
Planning of market research	Reference to how research must be effectively planned; objective setting, timescales, informing an outcome ie the marketing proposal.		Page 61	4
Research techniques	Look at primary/secondary research techniques which may be appropriate for this unit. The internet could be used to investigate different financial providers.		Page 61	6
Presentation of findings and analysis of data	General classroom exercises could be used to demonstrate analytical techniques. Select two mortgages from different financial providers. Analyse these against the criteria found under the heading 'Constraints affecting the provision of financial services'		Page 61	6
Task 3	See Assignment Brief	A03	Page 61 Assignment brief Page 63	8
Designing appropriate financial package	Explain to candidates the importance of linking their financial package to their research and analysis. Different ways of presenting the financial package.		Page 62	4
Task 4	See Assignment Brief	AO2	Page 62 Assignment Brief Page 63	8

OCR additional scenario	Introduce additional scenario. Introduce a series of classroom exercises that look generically at a customers/businesses changing circumstances.		Page 63	4
Task 5	See Assignment Brief	AO4	Page 63 Assignment Brief Page 64	4

Evidence requirements have now been met for Unit 7

Delivery Ideas

Overview of the Financial Services Market: Why do People Need Financial Services? Why do Businesses Need Financial Services? Constraints that can Impact on the Provision of Financial Services

The centre could arrange a talk from one of the main financial service providers to discuss the changes that have been taking place within the industry over the last ten years establishing a general context for the unit.

Candidates need to be aware of what makes up the financial services market. This will involve an introductory look at the different providers and the products they offer. Candidates could do presentations . each one covering one of the main financial service providers stating advantages and disadvantages of the products they offer the general public. A clear distinction should be made between personal and business providers.

Having looked at the different products and services out there introduce candidates to the personal needs people have for financial-service providers and products. The use of case studies will help clarify the variety of different situations where people will make use of financial-service providers.

Then introduce candidates to the different needs businesses have for financial service providers and products. The use of case studies will help clarify how and when businesses will make use of financial-service providers.

Candidates will finally need to understand that there are different legal and ethical constraints that are attached to different financial-service products available on the market. Candidates could review leaflets for different financial products to see how they comply with the necessary legislation as well as covering codes or practice, professional associations or watchdogs such as Ombudsman of the Financial Services Agency and the Bank of England for the ethical angle.

Task One

This task covers the theoretical content of the unit.

Scene Setting, OCR Scenario and Task Two

Introduce candidates to the case study. Classroom discussion on the issues that it raises to provide candidates with the general themes they will need to consider when carrying out their own investigations. Maybe spilt the class into two groups . one that looks at the personal issues and the other the business issues that arise from the case study before reporting back to the group as a whole.

Planning of Market Research

The first stage of research is for candidates to outline their research objectives. This will help them devise their research material and will allow them to collect appropriate, realistic and up-to-date information which will inform the financial package. These objectives should come out of Task two when the brainstorming activity takes place.

Research Techniques

In order to gain sufficient information from their selected business candidates are required to carry out primary and secondary research. Candidates will need to investigate the different providers and products currently available on the market for both personal and business use.

Research techniques may have been covered in other units however, some time revising the concepts may be useful.

Presentation of Findings and Analysis of Data

Candidates may need help in how to interpret and analyse results and guidance on how data should be presented before they investigate their own vocational context.

Task Three

Having been briefed on types of possible research and possible analytical techniques, candidates are free to investigate the OCR case study further with a view to suggesting an appropriate financial package for the given customer.

All financial products have different characteristics and candidates need to focus their attention on the following points:

- risk
- legal issues

- ethical issues
- convenience
- security
- speed of payback
- flexibility of finance
- availability of advice
- clarity and impartiality of information provided
- ease of use.

Candidates need to analyse the products and providers using the above criteria as a guide.

Designing an Appropriate Financial Package and Task Four

At this point in your role as teacher you may want to invite a bank manager into the school to talk about how they may put together a financial package for a customer who has both personal and business needs. Examples of templates could be consulted before the candidate focuses on their own research and comes up with a package of their own . this would bring a truly vocational flavour to proceedings. You must stress the importance to candidates of linking their package to the outcomes of their research and analysis.

OCR Additional Scenario and Task Five

As we progress through life we experience changes in our circumstances. As these changes take place we have different needs for financial services and products. Candidates need to be aware of the type of life changes that can happen and how this could affect a person's demand for financial services and products. The same is true in business. Candidates will need to gain a general understanding of potential business changes and how this affects the financial services and products they require.

Teachers are now required to release to candidates extra information regarding a change in future circumstances for the vocational context.

Candidates are required to consider the effectiveness of the financial package they have created in light of the additional information they receive. Candidates are not expected to undertake additional research in order to suggest how these needs could be met. The idea is to consider if the package they have recommended would be sufficiently flexible enough to cope with these changes. An example would be could a mortgage be paid off early or is there a penalty fee?

Assignment Brief

You are going to prepare a report based on your investigations into the financial services market. The outcome of your investigations will be to recommend which financial providers and products will suit both the personal and business needs of your customer as outlined in the scenario supplied by OCR. You report will be broken down into five sections which correspond to each of the tasks outlined below:

Task One (AO1)

The first section of your report will contain the following sections:

- an overview of changes that have taken place within the financial services market in recent years
- an overview of the different financial providers/products available
- an overview of why customers will need financial providers and products on a personal and business level
- constraints which can affect the provision of financial services/products.

Task Two (AO1)

You will now have been provided with the OCR scenario which will provide the focal point for your subsequent investigations. In this section you need to show evidence of brainstorming the information you have been given, looking at the customer's business and individual needs, the types of financial providers/products you may want to investigate further possible constraints you may have to consider. This section of the report should be a short brainstorming session but the evidence you generate may provide further depth to AO1.

Task Three (AO3)

You are now required to undertake and analyse the results of primary and secondary research which will inform your financial package.

In order to conduct successful market research you must ensure you carefully plan what information you are seeking and how this will inform your financial package. Setting yourself objectives is a good way of keeping the focus of your research on the creation of an appropriate financial package.

Having undertaken your research you must then analyse your results. You need to present the findings of your research and are encouraged to use tables, charts and diagrams as well as text to illustrate the points being made.

Task Four (AO2)

Using the results of your research and analysis of data the fourth section of your report should now focus on providing a financial package that meets both the personal needs and business needs of your customer. To access the higher mark bands for this section of your report it is crucial that you directly apply your financial package to the needs of your customer with clear links to your research and analysis.

Task Five (AO4)

You will now be provided with additional information on your customer, both in terms of changes in business direction as well as changes in personal circumstances. The financial section of your report should therefore look at the effectiveness of the financial package you have generated given these changes in future circumstances. Focus at this stage on providing reasoned arguments as to whether your financial package will need to change or whether certain aspects of it can remain. You are not expected at this point to carry out additional research, only hypothesise on the types of changes you may have to make to your financial package in light of future changes.

Unit F247: Understanding production in business

Introduction

In this unit candidates will need to explore a real business with the emphasis clearly focused on the activities carried out by a production department and the issues that are considered in the production process for a specific item.

Candidates will need to know and understand:

- the role of the production department
- operational efficiency
- organising production
- ensuring quality
- stock control
- health and safety
- research into production
- potential production improvements.

Candidates will explore how an item of their choice is produced within an appropriately-sized manufacturing business. Candidates must ensure that they can access adequate production information to answer the following questions:

- What is the role of the production department within the selected business?
- How efficient is the production department?
- How does the selected business organise production?
- How does the production department within the selected business ensure quality?
- How does the production department within the selected business manage its stock control?
- How does the selected business ensure compliance with health and safety legislation within the production department?

When compiling their report candidates need to make use of visual material as well as a written commentary. Photographs or flow diagrams supplemented by written text will all enhance the report and will help the candidate with their understanding of what can be quite a complex process.

Delivery Plan

This delivery plan is based on candidates having 60 guided learning hours in order to achieve a unit. Delivery ideas are presented in the notes in the next section.

This unit can be taught in a similar format to other units detailed within this teacher resource pack with the majority of the content being taught before candidates begin their own investigations. However, this delivery plan suggests an alternative model, where blocks of content are taught immediately before the candidate investigates these same content blocks in relation to their chosen vocational context.

Topic	Content Delivery	AOs	Delivery Ideas	No of hours
Production department	What is the role of the production department? How does the production department interact with other functional areas?	Candidates. work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding.	Page 69	2
Operational efficiency	How do businesses measure efficiency? How can productivity be improved and what measure have businesses already undertaken to achieve this?		Page 69	3
Choice of business	Identification of the type of business that the candidates will investigate.		Page 70	2
Task 1	See Assignment Brief	AO1 AO2 AO3	Page 70 Assignment Brief Page 73	10

Topic	Content Delivery	AOs	Delivery Ideas	No of hours
Different methods of production	What are the different methods of production? Linkage to case studies/live businesses that use these methods.	Candidates work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding.	Page 70	3
Stock control	How do manufacturing businesses manage their stock? Examples of different types of stock control being used within different business contexts.		Page 71	3
Task 2	See assignment brief	AO1 AO2 AO3	Page 71 Assignment Brief Page 76	10
Quality control	How is quality measured? What are the different systems that can be used? Use case studies to illustrate the different methods.	Candidates work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding.	Page 75	3

Topic	Content delivery	AOs	Delivery Ideas	No of hours
Task 3	See Assignment Brief	AO1 AO2 AO3	Page 71 Assignment Brief Page 76	7
Health and safety at work	General outline of Health and Safety at Work Act 1974, or as amended. Look at examples of manufacturing situations where there is evidence of good practice.	Candidates work generated from class exercises on these themes can be used to demonstrate a level of knowledge and understanding	Page 71	2
Task 4	See Assignment Brief	AO1 AO2 AO3	Page 72 Assignment Brief Page 76	5
Improvements to production	Look at case studies of manufacturing businesses that have been able to improve their overall efficiency. How has this been achieved?		Page 72	5
Task 5	See Assignment Brief	AO4	Page 72 Assignment Brief Page 77	5

Evidence requirements have now been met for Unit 8.

Delivery Ideas

Production Department

To start the unit, candidates will need to understand the role of a production department, how it interacts and is interlinked with the other departments within a business.

The use of case studies will help illustrate these points.

Operational Efficiency

In order for a manufacturing business to remain profitable the production department has to remain efficient.

Production departments are continually required to measure and account for their efficiency. This can be measured in a number of different ways:

- time taken for one item to be made on the production line
- staffing levels on the production line over a period of time
- output shown over a period of time eg hours, daily, weekly
- maximum-capacity level of company over a period of time
- where, and how, added value is included during the production process.

These techniques can be illustrated through role plays where students are making a product in teams competing with one another. They can work out the efficiency rates of each team using the criteria above and then compare results. This can also lead on to why the best team was the most efficient, how did they work? Why was it better?

Choice of Business

A class visit to a manufacturing business is probably operable for this unit. However, assessors must ensure prior to the visit candidates are going to be able to gain all the information they need to meet all the assessment objectives.

If candidates are all researching different manufacturing businesses the assessor needs to ensure that each candidate has adequate access to the information required to complete the assignment.

Task One

This task gets candidates to introduce their chosen business by clearly explaining what type of business it is, the type of product it produces and how the production department interacts with other functional areas.

The candidate then investigates the operational efficiency of their chosen business. They are given guidelines on how to structure this section of their report.

Different Methods of Production

Candidates need to be aware of all the different ways that a manufacturing business can arrange its production processes.

Candidates gain the most knowledge and understanding by going on visits to real businesses. If it is possible to get candidates into two different businesses that use different methods of production it is ideal. However, often this is not the case. Different production techniques can be developed through the use of role plays. Candidates have to produce an item using the different methods, and then the class can compare which method produced the most units in the allocated time. They can also look at the quality of the units.

Stock Control

Candidates need to be aware of the different types of stock control that are available to a manufacturing business.

They will need to understand the wider implications of JIT compared to holding large amounts of stock within the business.

There are quite a few case studies available that focus on the use of JIT and other stock control methods.

Task Two

Task two looks at the different methods of production and stock control systems. Candidates are required to explain what production method is used to produce their selected item.

Candidates have to complete this section of their report on the stock control systems used by their selected business. They must focus their evidence on the systems used for ordering stock, lead time, the point at which stock needs to be ordered and how stock needs to be managed.

Again guidelines are provided as to how to structure this section of the report.

Quality Control

Candidates need to be aware of the criteria by which manufacturing businesses judge the quality of their products as well as the systems that are in place to ensure that quality is maintained.

If the candidates have been participating in the role plays mentioned above they could be developed again to include a criteria that all goods must be checked for quality. Candidates can then apply the techniques they have learnt by clearly stating why they chose their particular method.

Case studies looking at quality control are often available.

Task Three

In order to achieve task three candidates are required to investigate and explain how the selected business maintains the quality of its products. Candidates need to identify the criteria by which quality is measured and the quality initiatives used by the selected business.

Again further guidance has been provided in the work assignment brief.

Health and Safety at Work

This section of the unit looks at the impact the Health and Safety at Work Act has had on the production department.

Candidates will need to have a broad understanding of how a manufacturing department would have to comply with the Health and Safety at Work Act. Candidates should be encouraged to investigate any new amendments to the act and see how their selected business has met the new criteria.

Task Four

In order to achieve task four candidates must describe the impact the Health and Safety at Work Act has had on the production department of their selected business.

Improvements to Production

Manufacturing businesses are always looking to improve their overall efficiency in order to remain competitive.

Candidates will need to learn how different types of manufacturing businesses can improve their efficiency. What type of policies they can use.

Newspapers may contain recent articles about businesses that have improved their efficiency and how this has been achieved.

Financial reports from PLCs may also contain information within the Chairman's and Director's reports outlining efficiency improvements.

Task Five

The final section of the report requires candidates to make recommendations about how the production process could be improved for their selected item. Candidates must fully justify their recommendations.

Assignment Brief

In order to complete this assignment you need to investigate a real business with the emphasis clearly focused on the activities carried out by its production department. You will need to explore how an item of your choice is produced within the selected business.

In order to collect sufficient information to complete a realistic and appropriate report you are going to need to undertake different forms of research. You will need to carry out both:

- primary research:
  - face-to-face discussions carried out with a speaker from a business production department
  - questionnaires and/or surveys carried out on a visit to a business to investigate the production department and other functional areas of the business

and

- secondary research:
  - information gained from text books, the Internet and other relevant reading material.

You are required to produce a written report containing visual images how your chosen business produces your selected item.

In your report you will need to analyse the strengths and weaknesses of the business's production of your chosen item in its current form. Ultimately, you will need to put forward possible improvements you would make to how your item is produced.

Keep all your research findings and material in appendices referring to them as required throughout your final report.

In order to complete the report, it has been broken down into the following tasks.

Task One (AO1 AO2 AO3)

This first part of the report will form an introduction into your selected business and chosen item. It is broken into two distinct sections as outlined below.

Section 1

To start this section complete a theoretical explanation of the bullet points below. Having completed this then go on and produce an introduction to your business, fully explaining what type of business it is, where it is located, how many people are employed there and what they manufacture. Introduce your chosen item stating clearly why you have selected this particular item out of the business's portfolio of products.

Describe the role of the production department within the selected business, clearly explaining how the production department interacts with other functional areas to produce your selected item. Use the following headings as guidance for this section of your report and focus your research into the following areas:

- Production/human resources
  - how staffing levels match the scale of production
  - which skills are needed to meet the operational needs of the business

- how the company motivates its workers to produce a quality product and to maximise productivity

- how workers' health and safety is ensured.

- Production/finance

  - the need to control production costs to enable the business to keep prices down and to make a profit

  - the need to cost each aspect of the work in order to determine prices, wages and profit or loss.

- Production/marketing

  - the need to build in the requirement of the customer into every aspect of their work

  - the need to ensure that the quality of the final product meets the expectations of the consumer

  - the need to produce the product/service at the right price at the right time for the customer.

Section 2

To start the section complete a theoretical explanation of the headings found within the section 'Operational Efficiency' on page 42 of the specification. Illustrate the formulas required to calculate the labour based efficiency calculations found in the second set of bullet points within this section.

Your report must then focus on the operational efficiency of your chosen business when manufacturing your selected item.

During your research you will need to find out the following information:

- time taken for one item to be made on the production line

- staffing levels on the production line over a period of time

- output shown over a period of time, eg hour, day, week

- maximum-capacity level of company over a period of time

- where, and how, added value is included during the production process.

When looking at these unit themes it is imperative that your research is as wide ranging and comprehensive as possible. Although your research may be contained in appendices you must ensure this section of your report contains an analytical section in which you comment on the strengths and weaknesses of:

- the role of the production department

- how the production department interacts with other functional areas
- its level of operational efficiency – ensure you cover the bullet points above and also provide complete the following efficiency-based calculations
  - Labour productivity
  - Unit-labour cost
  - Productivity
  - Capacity.

Task Two (AO1 AO2 AO3)

To start the section complete a theoretical explanation of the headings found within the section 'Stock control' on page 43 of the specification.

The third section of your report will look at the production methods and stock control systems your selected business uses to produce the selected item. They may use a combination of the following production methods:

- job
- batch
- flow
- cell
- lean.

Manufacturing businesses must have systems in place to ensure that they hold sufficient stock in order to maintain required production levels.

In order to complete this section of your report you are required to investigate the stock control system(s) that your selected business uses in order to produce your chosen item. You will need to cover the systems for:

- ordering stock
- lead time and point when stock needs to be ordered
- how stock needs to be managed, stock rotation, just in time. (JIT).

You will need to demonstrate throughout your evidence an understanding of stock-control data or diagrams, looking into factors which cause high or low stock levels. You will need to consider high levels of stock compared with a JIT approach as a means of controlling stock and improving quality.

This section also requires an analytical section following the same framework as established in Task 1.

Task Three (AO1 AO2 AO3)

To start the section complete a theoretical explanation of the headings found within the section ‘Ensuring quality’’ on page 43 of the specification.

All manufacturing businesses will have some form of quality control. Within your initial research you are required to find out the criteria, and methods your selected business uses to ensure quality is achieved during the production of your selected item. Use the following points to help you structure this section of the report:

- Quality Criteria
    - fitness for purpose
    - excellence in its function, appearance, and overall image
    - freedom from faults and errors
    - - durability with limited necessity for repair or replacement
    - value for money, a reasonable price for the standard of product.
- Quality Initiatives
    - quality control
    - quality assurance
    - ISO 9000 (or as amended)
    - TQM
    - Benchmarking
    - Kaizen (continuous improvement).

This section also requires an analytical section following the same framework as established in Task 1.

Task Four (AO1 AO2 AO3)

To start the section complete a theoretical explanation of the headings found within the section ‘Health and Safety’’ on page 43 of the specification.

Manufacturing businesses can be very dangerous places to work. The Health and Safety at Work Act (1974 or as amended) will ensure that your selected business keeps its workers safe throughout the production of your selected item.

To complete this section of your report you are required to investigate how your selected business deals with the impact of the Health and Safety at Work Act (1974 or as amended) during the production of your chosen item.

This section also requires an analytical section following the same framework as established in Task **one** - strengths and weaknesses of adherence to current health and safety legislation.

Task Five (AO4)

For the final section of the report you are required to make judgements on possible improvements to the way in which your chosen item is produced.

Use the following points to help you structure this final section of your report:

- the organisation of production and whether there are alternative methods that could be considered
- the stock control system and whether JIT could be a more appropriate method
- the interaction between production and other functional areas and whether this interaction could be improved in any way
- the adequate protection of the workforce, whether health and safety legislation is adhered to, and any possible improvements in this area.

The improvements you suggest should be backed up by your research and analysis you carried out in relation to Tasks 1-4.

Unit F249: A business plan for the entrepreneur

Key Skills Opportunities

Candidates produce business plans for new business enterprises of their choice. The business plan, in the context chosen, contains evidence of:

- their understanding of why a business plan is created, the different parts of a business plan and the constraints that can impact on the successful implementation of a business plan
- their plan being applied directly to their chosen business enterprise
- their research and subsequent analysis of their gathered data
- their critical evaluation as they consider how, and in what ways, constraints may impact on the successful implementation of their business plan.

Key Skill Detail for Communication Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1a: Take part in a group discussion: • make clear and relevant contributions in a way that suits your purpose and situation; • respond appropriately to others; • help to move the discussion forward.	None identified.		A group is **three** or more people. *Clear* and *relevant* contributions are required. The group discussion should provide opportunities for responding to a range of views and sensibilities, and for candidates to be able to take the lead in moving discussions on. Witness testimony should be accompanied by any support or preparation materials used.	Needs to be a *complex* discussion which would be in the context of the vocational area. Candidates must show evidence of being responsive and sensitive to others in the group, demonstrate ability to create opportunities for them to contribute to, and show that they are capable of, developing points and ideas.

Key Skill Detail for Communication Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1b: Give a talk of at least **four** minutes: • speak clearly in a way that suits your subject, purpose and situation; • keep to the subject and structure your talk to help listeners follow what you are saying; • use appropriate ways to support your main points.	None identified.		Talk must be given to **two** or **three** *familiar* people. Presentation *could* be supported by a purposeful image. Subject matter will usually be closely connected with work or vocational area. Candidates may use *brief* notes as a prompt **but** should not *read out* any prompt notes. Teachers should look for clarity of expression and evidence that the talk is well structured, keeps to the point, gives clear illustration of the main points and uses a variety of ways to support main points.	Needs to be a formal presentation of at least **eight** minutes. Needs to suit the purpose, subject, *audience* and situation.

Key Skill Detail for Communication Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.2 Read and summarise information from at least **two** documents about the same subject. Each document must be a minimum of **500** words long: • select and read relevant documents; • identify accurately the main points, ideas and lines of reasoning; • summarise the information to suit your purpose.	None identified.		Documents must relate to the *same* subject. Candidates must work *independently* to select material from the documents. Evidence that *appropriate* material has been selected from the documents will be implicit in the subsequent summary/comparison. Candidates must identify lines of reasoning from text (and images if used) *accurately*.	Each document must be at least **1000** words long. The subject matter must be challenging, offering a number of strands of thought or different approaches. Candidates must demonstrate the ability to 'synthesise' the information – this must go beyond a *summary* as required at Level 2.

Key Skill Detail for Communication Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.3 Write **two** different types of documents each **one** giving different information. **One** document must be at least **500** words long: • present relevant information in a format that suits your purpose; • use a structure and style of writing to suit your purpose; • spell, punctuate and use grammar accurately make your meaning clear.	Producing the business plan. Producing a critical evaluation as you consider how, and in what ways, constraints may impact on the successful implementation of your business plan.		Teachers can provide guidance for the appropriate format of writing required. Spelling and punctuation must be accurate and grammar correct, so that meaning is clear. Candidates should **not** be penalised for **one** or **two** errors providing meaning is still clear and mistakes in one document are **not** repeated in another. *Presentation* material can be produced in such a way that it can be used as a type of document. An image may be used to convey information.	Each document must give information about complex subjects (those that deal with abstract or sensitive issues and lines of enquiry that are dependant on clear reasoning). Subject matter must be challenging with use made of specialised vocabulary where appropriate. **One** document must be at least **1000** words long. Candidates must have responsibility for selecting and using ‘form and style’.

Key Skill Detail for Application of Number Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1 Interpret information from a suitable source: • choose how to get the information you need to meet the purpose of your activity; • obtain relevant information; • choose appropriate methods to get the results you need.	None identified.		Candidates must show that they can use the *source* to obtain information that is relevant to the *purpose* of the activity and can select, unaided, appropriate methods to get the required results. Evidence should include how choices are made. There needs to be evidence of information obtained from **two** different sources, **one** of which must be a chart or graph.	Candidates must show performance in planning and getting relevant information. **Two** different types of sources are needed, including a large data set (ie over **50** items). Candidates must justify choices made in identifying appropriate methods for getting information.

Key Skill Detail for Application of Number Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.2 Use your information to carry out calculations to do with: (a) amounts or sizes (b) scales or proportion (c) handling statistics (d) using formulae: • carry out calculations, clearly showing your methods and levels of accuracy; • check your methods to identify and correct any errors, and make sure your results make sense.	None identified.		Candidates must check their calculations and, in all cases, appropriate levels of accuracy need to be applied. Data used for part d needs to make comparison of **two** sets of data that makes use of **20** items. Calculations should involve **two** or more steps using information from N2.1. If additional activities need to be carried out to meet all requirements for N2.2 then *each* activity must include tasks for N2.2 *and* N2.3 or N2.1 *and* N2.2.	Calculations using information from N3.1 should involve at least **two** stages, ie where results from *one* stage are used to provide some data calculations at the *next* stage. Checking and accuracy at the appropriate level also apply.

<table>
<tr><th>Key Skill Detail for Application of Number Level 2</th><th>Opportunities in this Unit</th><th>Comments on these Opportunities</th><th>Watch Out!</th><th>Level 3 Enhancement</th></tr>
<tr><td>2.3 Interpret the results of your calculations and present your findings:
• select effective ways to present your findings;
• present your findings clearly using a chart, graph or diagram and describe your methods;
• use more than one way of presenting your findings;
• describe what your results tell you and how they meet your purpose.</td><td>None identified.</td><td></td><td>Findings from N2.1 and N2.2 could be developed to provide evidence for N2.3.
Candidates must present findings in two different ways using charts, graphs or diagrams.
In interpreting results and presenting findings, candidates need to select forms of presentation to match effectively the types of information being presented.
Candidates must describe both the methods used and what the results of the calculations mean in terms of meeting the purpose of the activity.
ICT can be used.</td><td>Evidence should show that candidates can select and justify methods of presentation and present findings effectively in two different ways, appropriate to the nature of the data being presented.
If ICT is used to produce these, it is essential that candidates check their accuracy and explain them fully.</td></tr>
</table>

Key Skill Detail for ICT Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1 Search for and select information to meet your needs. Use different information sources for each task and multiple search criteria in at least **one** case: • select information relevant to the tasks.	Produce research and subsequent analysis of your gathered data.		Both ICT-based and non-ICT-based information sources are required. The relationship between the information selected and its *purpose* needs to be clear. Multi-criteria searching required for ICT-based information. This search information may be used in ICT 2.2 and 2.3.	There needs to be clear evidence of *the planning process* in the use of ICT. Candidates must produce evidence of *appropriate* and *effective* searches for finding and selecting relevant information from ICT and non-ICT sources.
2.2 Enter and develop the information to suit the task and derive new information: • enter and combine information using formats that help development; • develop information and derive new information as appropriate.	Producing and evaluating the business plan.		Combined information must be developed, eg 'text and number' or 'text and image'. New information must be added from *other* sources.	Candidates must present evidence of *purposeful* use of e-mail; **one** of these e-mails must have an attachment related to it. Candidates must demonstrate the use of software features to improve efficiency.

Key Skill Detail for ICT Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.3 Present combined information such as text with image, text with number, image with number: • develop the presentation so that the final output is accurate and shows consistent use of formats; • use layout appropriate to the types of information.	Producing and evaluating the business plan.		Final work must be accurate, clear and saved appropriately. Candidates must present evidence of *purposeful* use of e-mail. Candidates must *select* and *use* an appropriate layout for presenting combined information.	Work needs to be checked for accuracy and sense. Candidates must develop the structure and content of the presentation in consultation with others, with evidence of how work was refined in response to others. Candidates must present information in a way that is appropriate to its purpose and *audience*. Candidates must present evidence of at least **one** e-mail *with attachment* related to the task – candidates are **not** required to receive and open attachments if this is **not** appropriate to the tasks.

Key Skill Detail for Improving Own Learning and Performance Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1 Help set targets with an appropriate person and plan how these will be met: • provide information to help set realistic targets what you want to achieve; • identify clear action points for each target and you will manage your time; • identify how to get the support you need and arrangements for reviewing your progress.	None identified.		Candidates must set *realistic* targets and identify *clear* action points for each target. Evidence is likely to include plans of **two** short-term targets. Candidates need to identify how to get the support they need and arrangements for reviewing their progress. Plans should **not** be produced in retrospect.	Candidates must provide evidence of setting at least **three** targets and will *record* their plan.

Key Skill Detail for Improving Own Learning and Performance Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.2 Take responsibility for some decisions about your learning, using your plan to help meet targets and improve your performance: • use your action points to help manage your time well; revising your plan when needed; • choose ways of learning to improve your performance, working for short periods without close supervision; • identify when you need support and use this effectively to help you meet targets.	None Identified.		Teachers need to ask candidates questions based around *Part A*, to check their awareness of different learning styles. A learning log may be the most useful form of evidence for this component. Other forms of evidence could include records from people who have seen the candidate work and observed how they managed their time. Candidates need to show they have improved their performance through using at least **two** different ways of learning.	Candidates must manage their time effectively to meet deadlines, revising their plans where necessary. Candidates must choose ways of learning to *improve* their performance. *At times*, candidates must work independently.

Key Skill Detail for Improving Own Learning and Performance Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.3 Review progress with an appropriate person and provide evidence of your achievements: • identify what you learned, and how you have used your learning in another task; • identify targets you have met and evidence of your achievements; • identify ways you learn best and how to further improve your performance.	None identified.		Candidates must identify at least **two** targets *they have met* and provide evidence of their achievements. These achievements must be drawn from at least **two** different ways of learning. Candidates must identify clearly how they used learning from *one* task to meet *another*. In the context of communication with an appropriate person, evidence of what candidates have said may include records produced by them *or* the teacher. Candidates must focus on the requirements of *IOLP* when evaluating and reviewing and **not** the *project outcome* itself.	In reviewing progress, candidates must provide information on ways they have used their learning to meet new demands and on factors affecting the quality of their outcome. There should also be evidence, drawn from consultation with appropriate people, to show how candidates agreed ways to further improve performance.

Key Skill Detail for Working with Others Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1 Plan work with others: • identify what you need to achieve together; • share relevant information to identify what needs to be done and individual responsibilities; • confirm the arrangements for working together.	None identified.		In a group or team situation candidates must identify what is being *achieved* – this evidence could be from *using* a plan that clearly shows the objectives, responsibilities and working arrangements, or it could be from teacher questioning. Candidates must *share information with others* to identify responsibilities.	It is unlikely that this opportunity will address Level 3 criteria.
2.2 Work co-operatively towards achieving the identified objectives: • organise and carry out tasks safely using appropriate methods, to meet your responsibilities; • support co-operative ways of working to help achieve the objectives for working together; • check progress, seeking advice from an appropriate person when needed.	None identified.		The most useful forms of evidence are direct observation by video or teacher, or audio recordings. Candidates must show how they have supported co-operative working – eg shown willingness to help sort out a disagreement, or adapted own behaviour to avoid offending others.	

Key Skill Detail for Working with Others Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.3 Review your contributions and agree ways to improve work with others: • share relevant information on what went well and less well in working with others; • identify your role in helping to achieve things together; • agree ways of improving your work with others**.**	None identified.		In sharing relevant information, candidates must show that they have listened to, and responded appropriately to, feedback from others. Candidates must identify their *own* role in helping to achieve things – it is **not** necessary for objectives to have been met – but candidates must *agree* ways of improving work with others. Candidates can provide evidence by written or recorded statements.	

Key Skill Detail for Problem Solving Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.1 Identify a problem, with help from an appropriate person, and identify different ways of tackling it: • provide information to help identify a problem, accurately describing its main features; • identify how you will know the problem has been solved; • come up with different ways of tackling the problem.	Identify why a business plan is created, the different parts of a business plan and the constraints that can impact on the successful implementation of a business plan.		Teachers need to probe candidates' underpinning knowledge of different 'ways' of tackling problems. Evidence can be in a variety of forms – handwritten, electronically produced, oral or visual.	Requires exploring **three** different ways of tackling a problem.

Key Skill Detail for Problem Solving Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.2 Plan and try out at least **one** way of solving the problem: • confirm with an appropriate person how you will try to solve the problem; • plan what you need to do, identifying the methods and resources you will use; • use your plan effectively, getting support and revising your plan when needed to help tackle the problem.	Apply your plan directly to your chosen business enterprise.		Teachers need to probe candidates' underpinning knowledge of planning methods. If **no** changes were made to their plan, the teacher needs to question the candidate on how they *would have* adapted their plan to get around obstacles. If support was **not** obtained/ used, the teacher needs to question the candidate on where/how their plan *could have* benefited from obtained/ used support. Candidates must have evidence that they *did* communicate with the appropriate person (eg teacher, supervisor) to confirm the option they took forward.	Requires exploring **three** different ways of tackling a problem.

Key Skill Detail for Problem Solving Level 2	Opportunities in this Unit	Comments on these Opportunities	Watch Out!	Level 3 Enhancement
2.3 Check if the problem has been solved and identify ways to improve problem solving skills: • check if the problem has been solved by accurately using the methods you have been given; • describe clearly the results, including the strengths and weaknesses of how you tackled the problem; • identify ways of improving your problem solving skills.	Produce research and subsequent analysis of your gathered data. Carry out a critical evaluation, as you consider how, and in what ways, constraints may impact on the successful implementation of your business plan.		The problem may **not** necessarily have been solved, but teachers must still probe each candidate's *knowledge* of problem-solving methods. *Checking* if the problem has been solved may be observed or video recorded.	Requires exploring **three** different ways of tackling a problem.

Introduction

In this unit candidates are required to explore issues relating to business planning by constructing a business plan of their own for a new business enterprise of their choice.

Candidates will need to know and understand:

- reasons for constructing a business plan
- information within a business plan
- appropriate research for a business plan
- business plan templates
- constraints that impact on implementation.

When choosing a business enterprise, candidates need to ensure that the one chosen is suitable to meet the assessment requirements for this unit. Candidates must be careful that the project they choose is not too large so that it becomes unmanageable and prevents them from producing a realistic, appropriate business plan. A domestic/industrial cleaning business, ironing service or mobile sandwich bar would all be realistic choices.

Candidates will be familiar with the need to plan their research and different forms of data collection. They are now required to draw on this understanding as they set about researching the business environment. A wide variety of information on the business environment needs to be collected by the candidate including:

Present state of the market:

- customer profiles
- competitor activities
- sales levels from comparable business(es)
- external factors such as interest rates and local labour market information.

Candidates must be aware that their financial strategy is the central component of the plan and should contain the financial documentation as listed in section 'Information within a business plan' of the unit specification.

Candidates will also be required to develop their analytical skills using marketing models - including more sophisticated models such as the Ansoff and Boston matrices. Candidates will be required to demonstrate more strategic thought processes turning their collected data into evidence to inform the development of the business plan.

Finally, candidates will be required to evaluate how, and in what ways, the constraints outlined in section 'Constraints that impact on implementation' of the specification will impact on the successful implementation of their business plan. These constraints must be prioritised with the candidate clearly explaining the reasons for the order of their prioritisation.

Delivery Ideas

General Information

The lynch pin to this assignment is the research that the candidates undertake. Detailed and extensive secondary and primary research will enable candidates to clearly target their business plan to the new enterprise. Candidates should aim to support every decision made within the plan with at least one piece of primary and secondary research.

Candidates will also need access to business plan templates in order to facilitate the production of professional documents that would be 'fit for purpose' within a 'real' business environment.

Which Business Venture?

The first part of this assignment must focus on the choice of an appropriate business. Candidates should be encouraged to considered ideas with which they are familiar, perhaps linked to a particular hobby or interest. If the idea is too large, candidates may struggle to cope with the more demanding parts of the financial strategy.

Time spent considering candidates' initial ideas and confirming they can access the level of information required will be time well spent in the long run.

Candidates may work in pairs or small groups but all their findings and ideas must be written up individually.

Why is a Business Plan Created?

Having decided on a suitable business enterprise candidates will then need to consider why a business plan is created. This will help candidates understand what information they will need to investigate, research and include within their own plans.

A good way to illustrate the reasons why a business plan is needed is to set the candidates a scenario: for example, what planning needs to take place in order to organise the valedictory ball:

- What would be the result if no planning took place?
- What would happen if only partial planning was to take place – the hall and disco are booked but nothing else has been arranged?
- What is the result when everything has been planned very well?

Candidates could then focus on the type of planning that is required in order to achieve the last bullet point.

The Different Parts of a Business Plan

Candidates must ensure they include the following sections within their plan:

- preliminary information
- marketing plan
- production plan
- financial plan
- human resource plan.

Candidates must be encouraged to cover each of the bullet points above in theory, making reference to the WYNTL section of the unit specification for further guidance. By completing this theory candidates will have a detailed understanding of the information they are required to research in order to produce a well targeted business plan.

This section builds on work covered within the AS specification and candidates should be encouraged to reflect back to their previous learning.

Most of the major banks produce their own starter packs for new businesses and these might give the candidates some idea of the type of information that should be included within each of the sections mentioned above.

Constraints that Impact on Implementation

Candidates will be required to have a theoretical understanding of the bullet points found within section ‘Constraints that impact on implementation’. They will apply this theory to their own business plan.

One way to teach this topic might be to use case studies from different businesses focusing on how each of the bullet points with the WYNTL section of the specification would affect their potential growth, market share, cash flow and profits.

Candidates need to understand that some of the constraints will have a much greater impact on some businesses than others. There needs to be evidence of prioritisation within the candidate’s evidence.

Task One

It is important that candidates have an understanding of why business plans are created. This will given them an awareness of the importance of each section of the plan that they are required to prepare.

The second part of the task requires candidates to describe theoretically the different sections of a business plan. By completing this section candidates will gain the knowledge necessary to research and compile a targeted business plan for their selected enterprise.

The third part of the task requires candidates to describe the constraints that could impact on the successful implementation of a business plan. By completing this section candidates will gain the knowledge necessary to complete their AO4 evidence.

Task Two

Prior to undertaking any research, candidates will need a basic idea of the type of enterprise to be planned. A classroom brainstorming activity might help candidates to decide on a suitable venture. Candidates then need to write up a short synopsis of their business idea so as to provide a contextual framework for the unit.

Please note if, as the result of their secondary and primary research, candidates wish to change some of their original ideas this could provide good evidence for their evaluation.

Task Three

This is the most in-depth section. Candidates must be encouraged to undertake a wide range of research which includes both secondary and primary. Candidates would be advised to follow the bullet points outlined in task three of the assignment to ensure that they research sufficient evidence in order to compile a well targeted business plan.

Candidates should be encouraged to show evidence of planning their research to ensure that they meet internal deadlines.

When analysing their data candidates should use a range of statistical techniques making reference to those used in Unit 1: Creating a marketing proposal.

Evidence of candidates' research could be placed in appendices.

Task Four

Having undertaken their research candidates should write up their analysis, drawing out key information that will be included in their business plan. Candidates are advised to use the four headings as outlined in task four of the assignment. This analysis and summary of their research findings is very important and will enable candidates to achieve the higher mark bands within AO3.

Task Five

This task requires candidates to compile their business plan. Candidates' business plans must make clear links to the analysis of their research undertaken in task four.

The assessor must be able to see the linkage between the facts and figures used within each section of the business plan to the candidate's research findings. If these links cannot be found, the plan will be considered to be over-theoretical and unable to achieve the higher mark bands for A02.

Task Six

This final task requires candidates to evaluate how, and in what ways, constraints may impact on the successful implementation of their business plan. Candidates are advised to use the bullet points stated within task six. In order to achieve the higher mark bands candidates will be required to prioritise which constraints they feel would have the greatest impact on their business plan. Throughout their critical evaluation candidates must link their thoughts and ideas to the information contained within both their business plan and their research and analysis.

Assignment Brief

You will be leaving college at the end of this academic year and are considering two options:

- enter work based training – earning while you are learning
- go to university.

As, yet you are unsure which route to take. You have decided to take a gap year before choosing either option. Your intention is to earn some money from June to the following April and then go travelling from May until October. The main problem with this idea is that you need money – currently this is in short supply.

You have always had visions of being the next Richard Branson and have therefore decided to put together a business plan. Having undertaken all the necessary research, ironed out all the potential problems, you can put the plan into action in early June. This will hopefully earn you sufficient funds to go travelling. If your idea takes off you might even be able to leave your venture in the capable hands of an employee while you enjoy your extended holiday.

You realise that you will need to persuade someone to invest in your new venture and therefore must prepare a business plan. In order to produce this plan work your way through the tasks outlined below.

Portfolio Tip: Throughout the assignment make sure you refer back to the specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of the 'What You Need to Learn' from the unit specification has been identified.

Task One (AO1)

You first task is to find out the following information:

- why a business plan is created (section –'Reasons for construction a business plan')
- the different parts of a business plan (section – 'Information within a business plan')

- constraints that can impact on the successful implementation of a business plan (section ‘Constraints that impact on implementation).

Portfolio Tip: By writing up this theory you will have an excellent understanding of the information you will need to research in order to complete your own business plan. This is a large task, but one worth doing well.

Task Two

You now need to give a basic introduction to your business venture. Use the following bullet points as guidance:

- name
- mission statement
- location
- physical size of business
- type of business ownership
- goals and objectives.

These can all be altered in light of your research but it is useful to set the scene for your assessor.

Task Three (AO3)

Research – This is the most in-depth part of the assignment and will determine your ability to construct a well targeted business plan which meets the needs of your new enterprise. Refer to section ‘Appropriate research for a business plan’ for the different methods of research that you could undertake.

You are required to undertake both secondary and primary research. Below are some guidelines of the information that you are required to research. In order to ensure full coverage make sure you make reference to the specification section ‘Information within a business plan’. You are required to support every statement made within your business plan where possible with analysis from both primary and secondary research.

Marketing

- Who is your target audience – why?
- Who are your competitors? What marketing techniques are they using?
- What media do your potential customers read, view, and listen to? How much will this cost me to use?
- How, from where and when do your customers want to receive the product/service?

- How do your competitors get their product/service to their customers?

- What price will your customers be prepared to pay?

- What price are your competitors charging?

- Information in order to complete a:

  (i) SWOT

  (ii) PEST

  (iii) Ansoff Matrix

  (iv) product life cycle

  (v) Boston Matrix.

Production

- What equipment and machinery do my competitors use to produce their product/service?

- What equipment and machinery will I need to produce my product/service? How much will this cost?

- What are the different stages of production that I will need to complete in order to get my product/service to my customers?

- What methods are available to ensure my product/service is always top quality?

- What supplies to do I need to produce my product, where will I get these from and how much will they cost?

Finance

- What do my competitors charge for their product/service?

- What will my customers be prepared to pay for my product/service?

- How often will my customers buy my product/use my service?

- What are the different expenses that I will incur in the running of my enterprise?

- Where can I obtain finance? How much is this going to cost me?

Human Resources

- What are the employment/unemployment levels in my local area?

- What is the average wage for my local area?

- Where are jobs advertised locally? How much does it cost to advertise a vacancy?
- How many people do I need to employ, how many hours will they work and how much will I pay them?

Task Four (AO3)

Having undertaken all your secondary and primary research you need to analyse your gathered data drawing out key information that can be included in your business plan. Use the following four headings as guidance:

- Marketing
- Production
- Finance
- Human Resources.

Task Five (AO2)

You should now have sufficient information available to produce your business plan. This needs to be compiled using a recognised standardised template. You could use the following headings as guidance.

Heading – Name of Enterprise

This section should be no longer than two pages. Summary of plan to include:

- what is the business
- what is the market
- potential for business
- forecast profit
- how much do I need to borrow
- prospects for the investor
- description of product/service.

Marketing Strategy

- four Ps – Product, Price, Place, Promotion. These will make reference to the marketing models used in AO3.

Production Strategy

- how the product/service will be produced/provided
- the different stages of production/delivering the service
- machinery and equipment required
- how quality will be maintained and assured
- timing of production/ delivery of service to meet customer needs.

Financial Strategy

- calculation of sales price
- calculation of fixed and variable costs
- break even analysis
- cash flow forecasts – best and worse case scenarios
- projected profit and loss account – best and worse case scenarios
- start up balance sheet.

Human Resource Plan

- number of employees needed
- skills and competencies
- recruitment method(s)
- training needs of employees.

Portfolio Tip: In order to gain the higher mark bands your business plan must make direct reference to your analysis of research completed in tasks three and four.

Task Six (AO4)

Every successful entrepreneur has to review their plan and consider, honestly, what constraints might impact on its implementation (section – 'Constraints that impact on implementation').

In order to complete this section you need to evaluate how each of the following bullet points might impact on the implementation of your business plan:

- legal
- financial

- social
- environmental
- technological
- competitive.

Portfolio Tip: In order to gain the higher mark bands you need to ensure that you prioritise the constraints. Make sure that within this section you clearly evaluate which ones you think could have the greatest impact on your business plan clearly stating the reasons for your selected ranking.

Unit F250: Managerial and supervisory roles

Introduction

In order to achieve this unit, candidates are required to show how an individual approaches his/her managerial or supervisor role within a selected business. **Note:** candidates are only investigating the work of one individual – either a manager or supervisor.

Candidates will gain an insight into the role of a manager/supervisor within an authentic business context of their choice.

Candidates will need to know and understand:

- the business context within which the report will take shape
- how to gather information for the report
- how to research the business context and analyse the information that is collected
- how to produce a report
- how to evaluate the factors which can influence the environment in which a manager/supervisor performs his/her role.

When choosing a context for this unit, it is important that candidates choose an appropriate business. Candidates must have excellent access to a manager/supervisor with whom they can engage with as part of their primary research. If candidates are to produce an effective report they need to have access to the business in order to fully understand the types of functions carried out by a manager/supervisor.

In order to gather this information, it is important that candidates visit their chosen business and speak to their selected individual to find out how they approach their managerial/supervisory role. This contact is especially important as candidates need to comment on their chosen individual's approach to their position. In order to gain this information candidates should use a combination of questionnaires, face-to-face interviews and work-shadowing enabling them to build up a picture of the way in which their chosen manager/supervisor performs her/his role.

Candidates will be required to write a report on the manager/supervisor's chosen approach. Their secondary research into management styles will support this report. Finally, as part of their report, candidates are required to evaluate the factors that can influence the environment in which a manager/supervisor performs her/his role.

Delivery Ideas

General Information

Candidates may wish to base this unit on their part-time employment. Before following this route, ensure that their manager/supervisor is prepared to allow access to sufficient information so they are able to meet all the requirements laid out in the specification.

What do Managers/Supervisors do?

In order to start this unit, candidates will need a detailed understanding of the different types of managerial/supervisory functions. This section could be based on the school/college with candidates identifying the different functions of managers/supervisors found within the school/college. If candidates choose to focus their initial studies on the school/college, they would be advised to look at the organisation of the support staff or canteen. This could prove less problematic than the management or supervision of teaching staff.

Different Management/Supervisory Styles

In order to cover the second part of the theory, candidates need to understand the different ways in which managers and supervisors carry out their roles within a business.

A good exercise here would be to get students to discus how they have been managed and supervised in the past. They could also be set the task of outlining how they would go about managing a team. If candidates worked in a group to complete Unit 2 they could reflect back to this experience. What skills did they display and use throughout this experience?

Management Theories

Candidates need to investigate and understand the different management theorists as outlined in the specification section ‘Researching the business context and analysing the information that is collected’.

If candidates have already identified how they have been managed/supervised in the past they might like to try and link these different management theorists to these experiences. Candidates could also link their own selected management style to the theorists.

A set of scenarios could be given to the candidates where they could work out what the best style of management would be for each scenario and link this to the management theorists. This could also be beneficial when candidates attempt AO4.

Scenario examples could include:

- production line workers
- salesmen working on a commission basis

- sales assistant in a large store
- a teacher
- a police officer
- a nurse
- trading standards officer.

Factors Influencing the Effectiveness of a Management/Supervisory Role

The exercise above will have started candidates thinking about what influences the style of management used in order to get the best out of the workforce.

Candidates now need to consider the factors outlined in section 'Evaluating the factors which can influence the environment in which a manager/supervisor performs his/her role' and how these could affect how the manager/supervisor performs their role.

Candidates could relate this section back to the way that they are currently or have been managed/supervised within the workplace.

Task One

Within this task candidates are required to undertake secondary research into:

- different types of management/supervisory functions
- different types of management/supervisory styles
- appropriate management theories
- factors that influence the effectiveness of a manager/supervisor role.

This theory will feed directly into their report as they demonstrate their understanding of the selected manager/supervisor role within their selected business.

Task Two

Candidates need to produce an action plan showing how, when and where they are going to collect their research. The plan should focus the candidates' primary research and set clear deadlines by which to complete the task by. In order to decide exactly what they are required to find out candidates may need to refer to the bullet points contained within task three of the assignment.

Task Three

This section is about the candidates actually going out and collecting their primary research. A bullet point list has been supplied in the assignment brief to help candidates focus their research and actually gain the information they need to complete the report. Candidates must be reminded to focus their research on the theory covered in parts a, b and c in task one.

Candidates' research documentation should be placed in an appendices and made reference to throughout task four of the assignment.

Task Four

Having undertaken their primary research candidates need to write up their analysis drawing out key information that will inform their report. The analysis and summary of their research findings is very important and will enable candidates to gain the higher mark bands within AO3.

Task Five

Having undertaken all their research and completed their analysis candidates are now required to compile their report. Within the report they must make clear reference to the analysis completed in task four of the assignment showing clearly how their chosen manager/supervisor approaches her/his current managerial/supervisory role within the selected business. Candidates would be advised to make use of the bullet points contained within the assignment brief.

Task Six

The final task requires candidates to evaluate the factors which can influence the environment in which the manager/supervisor performs his/her role. Due to the nature of this section candidates do not need to prioritise their evidence. It is felt the best way to tackle this section is to link each bullet point to a scenario. For example if the aims of the selected business are currently customer focused and then changed to a profit focus how would this affect how the selected manager/supervisors manages their tasks/role? Throughout the critical evaluation candidates must link their thoughts and ideas to the information contained within both their report and their research and analysis.

Assignment Brief

Portfolio Tip: You are only required to investigate one job role, either a manager or supervisor.

In your present part time position you have been offered the opportunity to be interviewed as part of the business's management training scheme. If you are successful you will be required to undertake supervisory duties through the summer prior to starting the management course in early September.

Whilst you appreciate this is an excellent opportunity, you are concerned that at present you have very little knowledge or understanding about what a manager/supervisor actually does. To improve your interview performance you have decided to find out exactly what the role of a manger/supervisor entails.

In order to complete this investigation you have decided to select an individual you know very well that holds a managerial or supervisory role and find out exactly what their job entails. You are then going to match this against current motivational theorists. Following your investigations, you should be much better prepared for your imminent interview.

Portfolio Tip: Throughout the assignment make sure you refer back to the unit specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of WYNTL has been identified.

Task One (AO1, AO3)

(a) The first thing you need to do is investigate and explain what different management/supervisory functions entail (‘The business context within which the report will take shape’). Use the bullet points for guidance:

- planning
- organising
- motivating
- monitoring and directing
- problem solving
- training and mentoring
- appraising.

You also need to explain how these functions can be affected by a number of variables including:

- culture of organisation
- objectives of the organisation
- structure of organisation
- availability of resources within the organisation.

(b) The next stage is to investigate and explain different types of management/supervisory styles. (‘Researching the business context and analysing the information that is collected’). This section will also count towards your AO3 mark.   Use the bullet points for guidance:

- democratic
- consultative

- autocratic
- supportive
- collaborative
- passive
- directive.

(c) The third section of theory focuses on different motivational theorists. You need to investigate and explain the following management theories ('Researching the business context and analysing the information that is collected'). This section will also count towards your AO3 mark. Use the following bullet points as guidance:

- Taylor – the scientific model
- Mayo – the human-relations model
- the systems approach
- contingency and 'what if' modelling – Fielder
- any other appropriate theories.

(d) The final section of theory focuses on the factors which can influence the environment in which a manager/supervisor performs her/his role ('Evaluating the facto4rs which can influence the environment in which a manager/supervisor performs her/his role'). Use the following bullet points as guidance:

- whether **one** particular management/supervisory style is more likely to generate results than using alternative management/supervisory styles
- whether a certain management style is more likely to foster better employee/employer relations than another
- how a management/supervisory role can be affected by changes to the business's aims and objectives
- how a management/supervisory role can be affected by changes to the culture/structure of an organisation.

Portfolio Tip: This theoretical section will also cover the secondary research that candidates are required to complete into different management/supervisory styles and motivational theorists.

Task Two (AO3)

As always, detailed and extensive research will be a major part of this assignment. In order to reach the higher mark band you will need to show evidence of planning how you will gather the information required for your report. In order to achieve this task you are required to draw up an action plan which includes the following points ('Planning how to gather information for the report'.):

- Set out the aims of your research – what do you need to find out?

- Set out your objectives – how will you find out this information?

In order to do this you will need to consider:

- All the different people you will need to have access to – how will you contact them? When?

- What will be the best method of gaining the information required from them? Will you ask them to complete questionnaires? Will you hold face to face discussions? Will you organise a meeting? When and where will this take place?

As you compile your action plan you will need to state the chosen method of research.

Task Three (AO3)

Having planned your research you now need to go ahead and collect the information you require. This section will be mainly based on your primary research as you will already have completed your secondary research in task one – investigating different management/supervisory styles and different motivational theorists.

In task two you will have already decided how to collect your information. You now need to consider the focus of your findings. Use the following bullet points for guidance on the information you need to gather about your selected manager/supervisor (‘Researching the business context and analysing the information that is collected):

- the types of skills and competencies that they possess

- the type of personality they have

- what motivates them as an individual

- how they approach different managerial/supervisory roles

- how they deal with certain situations and scenarios in their roles

- how do other employees view their management/supervisory techniques

- how do other stakeholders view their management/supervisory techniques.

Portfolio Tip: All your questionnaires, notes from interviews etc should be placed in appendices and referred to throughout task four.

Task Four (AO3)

Having completed your research you need to write up an analysis of your findings, drawing out all the key information that can be included within your report.

Task Five (AO2)

Having undertaken all your research and produced a detailed analysis it is now time to write the report. Your report should make clear reference to your analysis completed in task four and show how your selected individual approaches her/his current managerial/supervisory role within your selected business ('Producing a report'). Your report should include the following sections:

- overview of your chosen business showing an understanding of the environment in which your manger/supervisor works ('The business context within which the report will take shape);
- the different managerial functions your manager/supervisor undertakes and how these can be affected by the culture of the organisation, objectives of the organisation, structure of the organisation and availability of resources within the organisation ('The business context within which the report will take shape);
- the different management styles that your manager/supervisory uses within their job role ('Researching the business context and analysing the information that is collected);
- the linkage between the managers/supervisors management styles and management theorists ('Researching the business context and analysing the information that is collected).

Task Six (AO4)

This final section of the report focuses on the evaluation of factors which can influence the environment in which the manager/supervisor performs his/her role ('Evaluating the factors which can influence the environment in which a manger/supervisor performs his/her role).

In order to complete this section you need to consider the following issues:

- whether one particular management/supervisory style is more likely to generate results than using alternative management/supervisory styles
- whether a certain management style is more likely to foster better employee/employer relations than another
- how a management/supervisory role can be affected by changes to the business's aims and objectives
- how a management/supervisory role can be affected by changes to the culture/structure of an organisation.

Portfolio Tip: In order to gain the higher mark bands you do not have to show evidence of prioritisation. You are advised to try and link each bullet point to a potential scenario in order to help demonstrate depth and breadth of understanding.

Unit F251: Launching a business on-line

Introduction

In this unit candidates will explore issues relating to launching a business on-line by constructing an e-commerce strategy of their own for a business that has yet to develop e-commerce provision.

Candidates will need to know and understand how to:

- devise a strategy
- understand the environment within which the strategy will take shape
- plan the strategy
- research the strategy and analyse the information that is collected
- produce a plan of action.

The candidate's strategy will need to consider how e-commerce would be used by their chosen business, the advantages and disadvantages of e-commerce provision – to both the business and customers and the issues involved in setting up and running a website.

Candidates **do not** have to design a website although they may do so if they wish. When choosing an appropriate context for this unit, it is important that candidates have the flexibility to choose a business which markets products and/or services which interest them. For example, they may decide to choose a music company, a travel company, or a book company. Candidates need to choose a project which involves some kind of sales transactions taking place, such as buying certain products/services on-line. This is because, when candidates come to evaluating the back-end of their website, they need to consider security issues which will, of course, revolve around how customers will pay for their products etc. Beware of candidates choosing an information-only site as this will limit them as to what they can actually evaluate at the end of the unit. Neither is it appropriate for candidates to select a business which already has e-commerce provision – they would then simply be describing an existing website which is not suitable to meet the demands of this unit.

Candidates will be required to conduct two distinctive types of research. Firstly, candidates will be carrying out **primary** research to attempt to discover the buying habits and tastes of particular customer groups who may be interested in their e-commerce venture. Secondly, candidates will be looking into **competitor websites** that market similar products and/or services to their chosen business to allow them to analyse examples of good and bad practice.

Candidates might wish to adopt some kind of points-ratings system to analyse the quality of websites with a view to using examples of good practice in their own e-commerce strategy. Candidates should be use the analysis of their research to construct and justify the design of the front-end of their website. They must also demonstrate they have attempted to take into account potential-customer views and the needs of the business when deciding on their particular strategy.

Finally candidates will be required to evaluate what measures the business would need to take to deal with the manageability of the back-end of the website.

Delivery Plan

The lynch pin for this unit will be the candidates' choice of business. They need to select a business that has yet to develop e-commerce provision. Candidates would be advised to select a business whose competitors have already developed an e-commerce provision as this will enable them to gather good ideas for their own website proposal.

Candidates are not required to produce a website but they may do so if they wish. What they are required to do is to illustrate how the front-end of their website will work using one of the following techniques:

- PowerPoint slides
- internet site itself
- concept board with accompanying text.

Understanding how e-Commerce is used by Businesses

The starting point for this assignment is for candidates to learn how e-commerce can be used by different businesses. The theoretical learning could be linked to the investigation of current business websites. Candidates need to be aware of not only the advantages but also the disadvantages of e-commerce provision.

Issues in setting up and running a website

Candidates will need an awareness of the issues that can be encountered when setting up the front-end of a website and also the problems that can be associated with the running of the back-end of the website.

An IT specialist might prove to be a useful source of information for this part of the course. If the school/college has its own website a talk by the key personnel involved in its development might also be an excellent source of information.

Task One

It is normal for AO1 to link directly to knowledge and understanding with no application to a selected business. However, this time when one studies the assignment brief, AO1 has been linked to the business to be selected by the candidate. Ultimately, OCR will be accepting evidence that is either linked to the selected business or presented in purely theoretical terms.

This task asks the candidates to consider why the selected business would use e-commence. The second part of the task requires the candidates to consider the possible benefits and drawbacks of an e-commerce venture.

The final part of the task requires the candidates to investigate the issues involved with developing the front-end of the website. The ideas and considerations used here by the candidates will help them create the front-end of their own website in task five. The next stage of this section asks the candidates to investigate the issues involved with the back end of the website. A detailed understanding of this section will help candidates complete their evaluation in task six.

Task Two

Candidates are required to produce an action plan. They need to start by stating the aims and objectives for this new e-commerce venture. This will help them focus on the information they need to research. Candidates are then required to identify clearly the primary and secondary research they are going to undertake, setting clear timescales for each task. In order to decide exactly what to find out candidates may need to refer to the bullet points contained in task four.

Task Three

This section is about the candidates actually going out and collecting their primary and secondary research.

Candidates are required to carry out two distinctive types of research. Firstly, they will be carrying out primary research in an attempt to discover the buying habits and tastes of particular customer groups. Secondly, candidates are required to investigate competitor websites that market similar products and/or services to their chosen business to allow them to analyse examples of good practice.

Candidates may be advised to look at the bullet points in task four of the assignment in order to structure their research into competitors' websites.

Candidates' research documentation could be placed in appendices. Reference could then be made to these appendices when completing task four.

Task Four

Having undertaken their research candidates need to write up their analysis, drawing out key information that will inform the construction of the front-end of their website. The analysis and summary of their research findings is very important and will enable candidates to gain the higher mark band within AO3.

Task Five

Having undertaken all of their research and completed their analysis, candidates are required to construct the front-end of their website. They need to present the design of the front-end using one or a mixture of the following:

- PowerPoint slides
- Internet site itself
- Concept board with accompanying text.

In order to gain the higher mark bands within AO2 candidates must show that the front-end of their website is targeted to the specific needs of the selected business by making direct reference to their analysis undertaken in task four of the assignment.

Task Six

This final task requires candidates to evaluate critically what measures they would take to deal with the manageability of the back-end of their website. In order to achieve the higher mark bands within AO4 candidates must show evidence of prioritising the measures that would have the most impact on the selected business.

Assignment Brief

You have been approached by a local business (insert the selected business name here) to help it decide whether or not it should develop its own company website. The business is quite out of date when it comes to modern technology. It has asked you to consider the advantages and disadvantages of such a strategy and suggest some possible ideas should they decide to undertake the development of a website.

Portfolio Tip: Throughout the assignment make sure you refer to the unit specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of the 'What You Need to Learn' from the unit specification has been identified.

Task One (AO1)

(a) In order to compile your proposal for your selected business you need to consider how e-commerce would be used by the business ('The environment within which the strategy will take shape'):

- using a website to market a portfolio of products/services
- allowing customers to find out information about available products and services
- offering customers the opportunity to purchase directly, using websites as an alternative to more traditional methods
- transmitting purchase orders directly from the customer to the supplier
- processing payments for goods or services purchased.

(b) Having identified how the business could use e-commerce you now need to consider the benefits and drawbacks of such a policy.

Benefits that e-commerce could bring to your business include:

- an additional revenue stream
- the freedom of not having to sell through shop premises
- increasing the available market.

Drawbacks that e-commerce could bring to your business include:

- cost of development and site maintenance
- need for specialist skills
- updating of site information
- technical problems
- Distribution/logistics problems.

(c) Your final section is to describe all of the issues involved with setting up and running a website ('Production of the front-end of the website' and 'Evaluation of the manageability of the back-end of the website'). Use the bullet points below for guidance:

Front-End

- attraction for the customer to the site – graphics and illustrations to improve the cosmetics of the website
- functionality of the site
- user-friendliness of the site
- organisation of prices and descriptions of goods/services etc on the site
- kind of documents that will be used to gather customer details and their contents and layout
- methods of payment that will be accepted
- method of shipment of goods/information to potential customers, if required
- any language options (dependent on target market).

Back-End

- security issues eg credit-card numbers or account details can be vulnerable if transmitted from a standard web page

- legislation eg any information held by you about your customers is protected by the Data Protection Act (1998)

- maintenance of the website, eg product information needing to be updated frequently

- training and development eg existing staff may need extra training in using technologies that may be new to them

- cost issues

- distribution networks/logistics of supply.

Portfolio Tip: By completing (c) above you will gain an excellent understanding of the problems that you will need to consider and resolve when completing your own website. It will also help focus the research that you will undertake in task three.

NB: AO1 is normally evidenced through the use of theory only with no application to the selected business. Within this assignment brief candidates are encouraged to link their evidence to their selected business. Either type of evidence will be accepted – that which is linked to the selected business or evidence that is purely theoretical.

Task Two (AO3)

As always, detailed and extensive research will form the major part of this assignment brief. In order to reach the higher mark bands you will need to show evidence of planning how you will gather the information required for your report. In order to achieve this task you are required to draw up an action plan which includes the following points ('Planning the strategy'):

- set out the aims and objectives of your proposal. This will help you target your research

- describe who your target customers are likely to be

- describe how you will gain access to this target market - questionnaires, focus groups, one-to-one discussions. Can you visit a business that has an e-commerce strategy? Plan when you are going to undertake this research – set a realistic timescale for your research

- describe what type of secondary research you need to undertake. What commercial websites will you investigate? Who could you talk to about website design? When are you going to undertake this research? Set yourself a realistic timescale for your research.

Task Three (AO3)

Within this task you are required to carry out two distinctive types of research. Firstly, you will be carrying out primary research in an attempt to discover buying habits and tastes of particular customer groups who may be interested in your e-commerce venture. Secondly, you are required to investigate competitor websites that market similar products and/or services to the chosen business to allow you to analyse examples of good and bad practice. Your evidence might include printouts/screen dumps of similar websites ('Research of the strategy and analysis of the information that is collected').

Portfolio Tip: All your questionnaires, notes from interviews, print outs/screen dumps etc should be placed in an appendices and made reference to throughout task four.

Task Four (AO3)

Having completed your research you need to write up an analysis of your findings drawing out all the key information that will be referred to in your report.

Candidates may wish to adopt some kind of points-rating system to analyse the quality of websites with a view to using examples of good practice in their own e-commerce strategy. If this method is used candidates must clearly explain the ratings system used. For example - why is a '5' considered excellent? On what criteria has this decision been made? Candidates will be using the analysis of their research to inform the construction of the front-end of their website.

You need to analyse the website of competitors of your chosen business against a series of common criteria. These include:

- availability
- image
- product information
- accessibility
- security
- user-friendliness
- aesthetics
- ease of payment.

Task Five (AO2)

Having undertaken all your research you are now required to design the front-end of your website which is directly applied to the requirements of your selected business ('Production of the front-end of the website'). You can present this evidence in the following ways:

- PowerPoint slides or
- internet site itself or
- concept board with accompanying text.

When creating the front-end of your website you must consider the following issues:

- attraction for the customer to the site – graphics and illustrations to improve the cosmetics of the website

- functionality of the site
- user-friendliness of the site
- organisation of prices and descriptions of goods/services etc on the site
- kind of documents that will be used to gather customer details and their contents and layout
- methods of payment that will be accepted
- method of shipment of goods/information to potential customers, if required
- any language options (dependent on target market).

Throughout the compilation of the front-end of the website there must be clear links between your analysis of research and final design.

Task Six (AO4)

This final section of the assignment focuses on the evaluation of the measures you would take to deal with the manageability of the back-end of your website.

This requires you to consider how you would deal with the bullet points listed below:

- security issues eg credit-card numbers or account details can be vulnerable if transmitted from a standard web page
- legislation eg any information held by you about your customers is protected by the Data Protection Act (1998)
- maintenance of the website, eg product information needing to be updated frequently
- training and development eg existing staff may need extra training in using technologies that may be new to them
- cost issues
- distribution networks/logistics of supply.

In order to gain the higher mark bands you will have to show that you have been able to evaluate in terms of prioritising those bullet points that you think will have the greatest effect on your selected business.

Unit F252: Promotion in action

Introduction

In this unit, candidates will explore issues relating to promotional activity by constructing a promotional strategy for a new product or service of their choice within a chosen business context.

Candidates will need to know and understand:

- how to devise a strategy
- the environment within which the strategy will take shape
- how to plan the strategy
- how to research the strategy and analyse the information that is collected
- how to produce a plan of action
- the internal and external influences on promotional activity.

When choosing an appropriate context for this unit, it is important that candidates choose a medium- to large-sized business which currently undertakes some form of promotional activity. Although candidates are not expected to simply describe an existing promotional strategy, it may help them to look at how current products and services are promoted within their chosen business to help inform strategy development for their own chosen product or service. Candidates need to choose a business with an already varied product portfolio, allowing them to suggest a new product to add. Candidates also need to choose a business with at least one major competitor so that they can compare and contrast methods already used by their chosen business with potential competitors.

Candidates might begin by explaining the current promotional activity that takes place within their chosen business. This approach would provide a context for their subsequent research, analysis and strategy design.

Candidates will be familiar with the need to plan their research and the different forms of data collection available as they carry out two forms of research. Firstly, candidates will carry out primary research to gather information on customer tastes and their needs for a new product or service. These will not only be existing customers of the business but also potential new customers who, through an effective promotional strategy, may move across from competitors to buy into the business's new product or service. Secondly, candidates need to be encouraged to examine strategies used by competitors. They can examine market positions of current products and make judgements about the levels of success obtained from various strategies. Candidates may wish to adopt some kind of points-rating system to analyse the quality of other promotional strategies. If this method is chosen candidates must clearly explain the rationale behind their ranking system. For example what criteria were used to warrant a '5' being awarded?

When producing the two promotional media, candidates need to include their two finished concepts – whether these are posters, advertisements, a storyboard or a newspaper advertisement. There should be clear evidence of how the candidate has arrived at these two forms of promotional activity, drawing information from the candidate's research and analysis.

Finally, candidates are required to critically evaluate the effectiveness of their chosen promotional strategy, taking into account possible internal and external influences.

Delivery Ideas

General Information

The starting point for the candidate is to choose the correct type of business on which to base this unit. The next step is to consider the new produce or service that they will launch. After completing their research and analysis they are required to produce a promotional strategy, using at least two promotional media, for promoting the product or service. Candidates must include their two finished concepts in the final portfolio.

Various Forms of Promotional Activity

Candidates will need a detailed understanding of the different kinds of promotional activity that businesses can use in order to promote their products or services.

Teachers could use a variety of different promotional campaigns that are running at the time of delivery in order to give the unit a real vocational context.

How and when are these Promotional Activities used?

Within this section candidates will need to gain a detailed understanding of when and how each of the promotional activities identified would be used.

By tapping into current promotional campaigns candidates will begin to understand how and when different types of media are used.

Internal and External Factors that can Influence Promotional Activity

Candidates will need knowledge and understanding of the internal and external influences that could influence their promotional strategy. They will be required to use the bullet points in the specification under section 'Internal and external influences on promotional activity' to evaluate their strategy.

Task One

This first part of the assignment is the theoretical coverage of the knowledge and understanding candidates will require to complete the remainder of the assignment. The task has been broken down into three sections. The first part requires candidates to describe the variety of formats promotional activity can take. Candidates will enhance their evidence if they make reference to current or past promotional campaigns.

Having established the various forms promotional activity can take, candidates are then required to describe how and when each form of promotional activity is used. Candidates can demonstrate a detailed understanding of these concepts by linking their theory to the examples they used within the first part of the task.

The final section of this task requires candidates to demonstrate an understanding of the internal and external factors that can influence promotional activity. Candidates could discuss hypothetically the internal and external factors they feel could have influenced the promotional campaigns they have used as examples throughout this section.

Task Two

Candidates are required to produce an action plan which clearly outlines how they intend to undertake their research. The aim of the task is to help candidates focus on the information they need to collect and research and to set themselves realistic timescales for the completion of the task. In order to establish exactly what information they are required to research they may need to refer to task three of the assignment.

Task Three

This section is all about the candidates actually carrying out their research. Their primary research should focus on their potential customers and potential demand for the new product or service. Candidates will also need to research into the type of promotional features that would entice customers to purchase their product/service.

Candidates' secondary research should focus on examples of promotional activity that other businesses are using to promote a similar range of produces or services. Candidates might wish to devise a points scoring system as a method of comparing and analysing the impact different methods of advertising have. If this method is chosen candidates must clearly explain the rationale behind their ranking system. For example what criteria were used to warrant a '5' being awarded?

Task Four

This task focuses on the analysis of the research carried out in task three above. Candidates are required to draw out the key information from their research in order to target their promotional strategy.

Within the assignment brief candidates have been given guidance on the criteria they could use to analyse promotional activity that other businesses are currently using.

Task Five

Having analysed all their research candidates are now ready to produce their marketing strategy which includes two finished concepts of their promotional media.

To start their strategy they need to state the aims and objectives of their promotional activity. Candidates have been supplied with some examples of possible aims and objectives. These will need to be developed in order to become specific to their selected product/service and promotional campaign.

The second part of this task focuses on the two finished concepts of the candidate's promotional media. This could include – posters, advertisements, a storyboard or a newspaper advertisement. Candidates will also need to consider the timescale of their promotional campaign and possible costs.

The final stage of this task is the explanation of why the two forms of promotional media were chosen and evidence of how they have been targeted to the candidate's selected business. This section must make direct linkage to the candidate's research and analysis undertaken in task three and four.

Task Six

This final task requires candidates to evaluate critically the effectiveness of their promotional strategy, taking into account internal and external influences. Within the assignment brief suggestions have been given on the criteria they could use within their evaluation. Under the heading 'internal influences' there is a bullet point headed 'the timescale involved'. This should be linked to how long the campaign will run for not the timescale in order to design the campaign.

In order to gain the higher mark band within AO4 candidates must show evidence of prioritising the influences that would have the greatest impact on the effectiveness of their promotional strategy.

Assignment Brief

You have been considering a career in advertising and marketing may be the one for you. As part of your AS Applied Business course you studied marketing but have never studied promotion in action. You have decided to try and launch a promotional campaign for a business of your choice in order to discover what is involved when promoting a new product or service.

Portfolio Tip: Throughout the assignment make sure you make reference to the unit specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of the 'What You Need to Learn' from the unit specification has been identified.

Task One (AO1)

This first task is broken down into three sections.

(a) Describe the various forms promotional activity can take ('Producing a plan of action'):

- advertising using mass media, including TV and radio
- internet
- newspapers and specialist journals
- sponsorship, including events such as sports meetings, celebrity endorsements and particular programmes on TV
- PR (public relations), including press releases and conferences
- merchandising, including coupons, demonstrations, free trials and point of sale displays
- direct mailing, including trial packs, coupons and information leaflets.

(b) How and when each form of promotional activity is used ('producing a plan of action'):

- bringing forward a decision to buy – using an offer of a free product if the customer buys by a certain date
- encourage repeat purchases, so creating loyalty, eg offering a discount for cash with order
- encourage stockpiling by offering extra products for the same price, eg 3 for 2 offers
- encourage long-term loyalty to the company by the use of loyalty cards, often with bonus points when times are quiet
- encourage consumers to try a new product.

(c) The internal and external factors that can influence promotional activity ('Internal and external influences on promotional activity'):

Internal influences:

- the aims and objectives of the business as a whole
- the aims and objectives of the planned campaign
- market research
- the message to be communicated and the targeted audience
- the promotional budget

- the timescale involved.

External influences:

- social, cultural and economic
- ethical and environmental
- legislative and regulatory
- pressure groups
- competitors
- technology.

Portfolio Tip: In order to show a detailed understanding of the theory being covered you could make reference to current and past promotional campaigns to further illustrate your points.

A detailed understanding of the above topics will help you create your own promotional strategy and evaluate its effectiveness.

Task Two (AO3)

Prior to undertaking your own research, you need to describe how promotional activity currently takes place within your chosen business for its current range of products/or services. This section should be relatively small and simply focus on scene setting.

The next stage is to formulate an action plan for your own research which includes the following points ('Planning the strategy'):

- setting aims and objectives for your research
- deciding who your potential customers are
- selecting appropriate types of research.

Task Three (AO3)

In this task you are required to carry out both primary and secondary research ('Research for the strategy and analysis of the information that is collected').

Your primary research could include:

- questionnaires and surveys to gather information on customer tastes and their needs for a new product or service
- discussions with individuals in your chosen business to find out what kind of promotional features attract customers to current products and services

- Visits to chosen businesses to carry out a survey on the marketing department with the business.

Your secondary research could include:

- examples of promotional activity that businesses are using to promote a similar range of products or services to the new product or service that you choose to promote.

Task Four (AO3)

Having completed your primary research you need to write up an analysis of your findings, drawing out the key information that can be included within your promotional strategy (13.2.4).

The next stage is to analyse your secondary research against the following criteria:

- aesthetics
- message
- fitness for purpose
- originality
- communication.

Task Five (AO2)

Having undertaken all your research you are now ready to produce your promotional strategy which must include the following information:

(a) Aims and objectives of your promotional strategy.

These could include the following:

- making customers aware of the product/service and allowing them to recognise its existence
- convincing the public of the purpose and benefits of the product/service
- persuading customers that the product/service can benefit them
- leading customers to act, eg to make the decision to buy
- changing customers' attitudes.

(b) Finished concepts of your two promotional media alongside an explanation of timescale and an estimate of the potential cost of the campaign.

(c) An explanation of why you have chosen these two types of media and evidence of how they have been targeted to your chosen business. This section should make direct linkage to your analysis undertaken in task four.

Task Six (AO4)

The final section of the assignment focuses on the evaluation of the effectiveness of your promotional strategy, taking into account internal and external influences ('Internal and external influences on promotional activity'). This requires you to prioritise which influences you think would have the greatest impact on the effectiveness of your promotional strategy.

You are advised to use the bullet points below for guidance.

Internal influences:

- the aims and objectives of the business as a whole
- the aims and objectives of the planned campaign
- market research
- the message to be communicated and the targeted audience
- the promotional budget
- the timescale involved.

External influences:

- social, cultural and economic
- ethical and environmental
- legislative and regulatory
- pressure groups
- competitors
- technology.

Unit F253: Constructing a financial strategy

Introduction

In this unit candidates will construct a financial strategy within a given business context. Candidates will be provided with a series of financial data in the form of a case study which will inform candidate's subsequent investigations. Candidates need to respond to a series of financial tasks within the given business context and use their analysis of the material to make a series of recommendations of how the business should move forward in terms of their financial planning for the future.

Candidates will need to know and understand how to:

- devise a strategy
- understand the business context within which the strategy will take shape
- plan the strategy
- research the strategy
- analyse to inform the strategy
- evaluate and make recommendations.

This unit provides a thorough introduction into the fundamentals of financial record-keeping and an understanding of the processes involved in the production of the final accounts for a business and how this financial information can be used for future financial planning.

Candidates will need to use the case study which will be provided by OCR to meet these requirements. This case study will be issued on an annual basis and will be available via OCR's website. It will provide a vocational context/scenario which candidates need to use as their focus for this unit.

It is important for teachers to monitor candidates' progress, but the feedback you provide needs to be geared towards focusing on certain issues involved in the construction of the final accounts rather than commenting on problems with the figures themselves. Due to the nature of the unit, candidates will have many opportunities to revisit the figures and teachers need to ensure that, in the end, candidates' **work is their own**. Therefore, it may be that teachers ensure the second strand of this unit (AO2 Row 2 of the Assessment Evidence Grid) is completed by candidates under supervised class conditions to ensure that candidates produce individual, authentic evidence when working on the financial information.

Whatever financial information candidates are dealing with, it is important that they are allocated a fair amount of time for practice exercises to reinforce their understanding. It is important that some practical exercises are introduced to candidates at the start of the unit so that they can become confident and assured with financial techniques and processes before they move into their own investigations.

Having undertaken the theory, candidates are required to apply their knowledge and understanding to given financial data to record the transactions of a business through various stages, with the intention of producing a series of financial information – as dictated by the stimulus material.

Candidates are required to analyse the financial information that has been produced to comment on the financial viability of the business. Suitable ratios need to be selected by the candidate to analyse the performance of the business with individual and authentic comments being made. The case study may contain some year-on-year information so that candidates can make a series of analytical comments on how the financial performance of the business has changed over a period of time.

Finally, candidates are required to evaluate critically how the business, in the given context, should plan its financial activities in the future. Candidates will be provided with a number of possible options available to the business in terms of financial planning for the future and they need to critically evaluate which option (or combination of options) would be most suitable for the business to pursue. Some possible issues to consider have been provided in section 'Evaluation and recommendations' of the unit specification but it is important that candidates' evaluations are based on the final documentation they have constructed and analytical comments that they have made.

Delivery Plan and Assignment

As candidates will be issued with a prescribed case study from OCR, a delivery plan/assignment has not been provided for this unit. The case study will clearly specify for candidates the tasks they will need to complete with regard to the stimulus material and the case study will ensure candidates can fully access all assessment objectives for the unit. The case study will be issued on an annual basis and will be available for downloading from OCR's web-site at the start of each academic year.

Unit F254: Launching a new product or service in Europe

Introduction

In this unit candidates will explore issues in a European context by constructing a strategy for a UK business which currently operates in the UK only and may wish to launch a new product or service into European markets in the future. Candidates will produce a written summary showing how their business will deal with the many issues it needs to consider when launching a new product or service in European markets.

Candidates will need to know and understand how to:

- devise a strategy
- understand the business context within which the strategy will take shape
- plan the strategy
- research the strategy and analyse the information that is collected
- produce a plan of action
- evaluate the strategy.

When choosing an appropriate business, candidates need to try to select one with which they have excellent, close links. They need to have access to all the necessary information to fulfil the evidence requirements for this unit, such as information on:

- functional areas
- modes of distribution
- skills of the workforce
- how logistics are dealt with
- ICT support etc.

It may help the candidates to imagine that the business they choose is thinking of expansion, even if that is not necessarily the case. This would mean that candidates have a lot of information that they could draw out of their business immediately, eg staff levels, financial position, number of functional areas etc and how these issues would have to be reconsidered in light of a more expansionist business plan. Suggesting a business simply sets itself up on-line from their UK base to operate in European markets is not a suitable approach and is unlikely to allow candidates to fulfil the evidence requirements for this unit.

Candidates also need to choose a new product or service that could be launched in European markets for the first time. The product or service can already be marketed in the UK, but candidates need to consider how the launch of this produce or service in Europe would bring with it new considerations. These may include promotional methods, issues of language and culture and any other relevant issues.

Candidates' research needs to take in as many different perspectives as possible, using a wide range of data-collection techniques. It needs to be apparent from candidates' research that they have really 'got inside' their business, and tried to think about the impact that moving into European markets would have on the business. Information from within the business as well as the external environment will add real depth to the candidates' thought processes.

Finally, candidates are required to critically evaluate the effectiveness of their strategy within the context of their chosen business.

Delivery Plan

Once again the lynch pin for this assignment will be the candidates' choice of business. Candidates will need excellent contacts with their chosen business in order to meet all the evidence requirements.

Candidates need to select a business that is not currently trading outside of the UK. They then need to consider a new product or service the selected business could launch within the European markets selected. Candidates could use a hypothetical scenario which implies that their selected business would like to break into the European markets in the near future and this is the product/service they will use to do so.

Understanding the Characteristics of the European Market

In order to achieve this section candidates will firstly have to decide in which European market their chosen business wants to launch its new product.

Having decided this, candidates can evidence each of the bullet points outlined in the unit specification under section 'The business context within which the strategy will take shape'.

Teachers would be well advised to spend some time setting the scene and giving a general introduction into the European Union as a whole before specifically looking at individual member states.

Teachers may then decide to select some of the European countries the candidates could choose and introduce the key themes. An alternative method of delivery could be showing the candidates how and where to find the information required in order to evidence section 'The business context within which the strategy will take shape'.

European Market and its Potential Impact on UK Businesses

This section covers the second section of 'The business context within which the strategy will take shape'. Candidates will need to understand the areas that will impact on any business that is thinking of operating in European markets. Candidates should be guided by the bullet points found under the second section of 'The business context within which the strategy will take shape'..

This part can be taught theoretically, making use of case studies to illustrate the impact of each section.

Introduction

Candidates would be well advised to give a brief introduction to their selected business and the new product/service they intend to launch in Europe. This will set the scene for the candidates' subsequent investigation.

Task One

This task requires candidates to demonstrate an understanding of the characteristics of the European market and its potential impact on UK businesses.

In order to complete this, candidates will need to make reference to section 'The business context within which the strategy will take shape'. The first set of bullet points will help the candidates structure their evidence in order to cover the key characteristics of the EU. The second set of bullet points will help candidates structure their evidence when looking at the potential impact the EU market could have on UK businesses.

Task Two

Candidates need to produce an action plan showing how, when and from whom they will collect their research. A bullet point list has been supplied in task three to help candidates target their research and they may need to make reference to this during the planning stages.

Task Three

This section is all about candidates actually going out and collecting their primary research. A bullet point list has been supplied to help candidates focus their research and obtain the information they will need to compile the written summary.

Task Four

Having undertaken their primary research candidates need to write up their analysis, drawing out the key information that will inform their summary. The analysis and summary of their research findings is very important and will enable candidates to gain the higher mark band within AO3.

Task Five

Having undertaken all their research and completed the analysis candidates are now required to compile their written summary. Candidates' summary must be drawn from their research and analysis and should include the bullet points outlined within the task.

Task Six

The final task requires candidates to evaluate the effectiveness of their strategy within the context of their chosen business. Throughout their evaluation candidates would be well advised to make use of the bullet points outlined within the task. Their evaluation must link their thoughts and ideas to the information contained within their written summary and their research and analysis. In order to achieve the higher mark band throughout their evaluation candidates will be required to prioritise which influences will have the greatest impact on their selected business.

Assignment

You are a business consultant who offers support and guidance to businesses which are looking to move into European markets.

You have been approached by a local medium-to-large sized business that currently only trades within the UK. It has asked you to produce a strategy outlining how it could launch a new product or service in Europe.

Portfolio Tip: Throughout the assignment make sure you refer to the unit specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of the 'What You Need to Learn' of the specification has been identified.

Introduction to Task

Before you start the tasks outlined below you are advised to give a basic introduction to the business you have chosen to investigate. You will also need to describe the new product/service that the business intends to launch in Europe.

Task One (AO1)

The first part of this task requires you to describe the characteristics of the European market (Section - The business context within which the strategy will take shape'.).

Use the following bullet points as guidance:

- demographic profile
- main imports and exports
- income levels

- labour skills and employment rates.

The second part requires you to describe the potential impact of the European market on UK businesses.

Use the following bullet points as guidance:

- **Economic** – the impact of operating in the Single Market, including the implications of the European Monetary Union (EMU) for certain member states

- **Legislation** – the impact of EU legislation on employers and employees including regulations and directives, particularly the impact of the Social Charter on employment and minimum wage rates

- **Customs** – differences in business practices including banking systems, working hours, national holidays, operating in different languages, awareness of different social customs and lifestyles

- **Trade** – the significant differences between trading with the EU and trading with non-EU countries – these differences vary from country to country within the EU and between non-EU countries

- **European assistance to businesses** – the EU offers support to businesses in the member countries in the form of financial assistance (available for both private and public sector organisations), advice and representation, and also information on the range of assistance available.

Task Two (AO3)

As always, detailed and extensive primary and secondary research will be a major part of this assignment. In order to gain the upper mark bands you will need to show evidence of how you will gather the information required for your report. In order to achieve this task you are required to draw up an action plan which includes the following points (Section –'Planning the strategy')

Sets out the aims of your research – what do you need to find out?

- sets out your objectives – how will you find this information out?

- types of research – methods which will be most suitable for generating the required information

- sources of information – sources which will be most useful for gaining information on issues relating to European expansion.

In order to complete your primary research you need to consider:

- who will you approach within your selected business?

- how will you interview this person – questionnaire, informal chat?

- when will you undertake this research?

In order to complete your secondary research you need to consider:

- information gleaned from the internet and other publications on European related issues
- leaflets, brochures gained from writing to European institutions such as the European Commission, European Parliament and The Council of the European Union
- information gathered from sources such as the European Investment Fund and European Social Fund.

Task Three (AO3)

Having planned your research you now need to go ahead and collect the information you require.

Your research needs to target how your business will deal with the many issues it needs to consider when launching a new product or service in European markets. Your research should consider the following points:

- logistics
- promotional activity, including branding
- ICT provision
- transport and distribution networks
- training and development of workforce
- skills of workforce
- financial context – sources of finance and budgeting
- communications both internal and external to business
- language, culture and custom
- regional assistance
- monetary framework
- trade policy
- management resources.

Portfolio Tip: All your questionnaires, notes from interviews etc should be placed in appendices and refer to throughout task four.

Task Four (AO3)

Having completed your research you need to write up an analysis of your findings drawing out all the key information that will be included in your written summary. Make sure you refer to the bullet points in task three.

Task Five (AO2)

Having undertaken all your research and produced a detailed analysis it is now time to produce your written summary (Section – 'Producing a plan of action'). Your summary should show how your business will deal with the many issues it needs to consider when launching a product or service in European markets. This summary should draw on your research and analysis and will include the following considerations:

- promotional activity – how the business will look to promote the new product or service
- transport and distribution networks – how the business will transport and distribute their new product or service to European destinations
- production of a new product or service – whether this will be carried out in the UK and then transported across or a production plant will be opened in an EU member state
- legal and workforce issues connected with this move
- how the customer-service side of the operation will be organised, within the context of different languages and different customs, to support the new product or service.

Task Six (AO4)

This final section of the report focuses on the evaluation of the likely effectiveness of your strategy within the context of your chosen business (Section 'Evaluating the strategy'). You will need to consider issues such as:

- whether the launch of your new product or service will require a different approach depending on the EU member state in which it is introduced
- what your strategy will mean in terms of your business's current short-and long-term aims and objectives
- how external influences, such as a change in market conditions in the UK or in Europe, will affect your chosen business's strategy
- impact on UK business – whether success abroad will damage market position at home, and how the disruption at home can be minimised.

Portfolio Tip: In order to reach the higher mark band you need to ensure that within your evaluation you prioritise those influences that will have the greatest impact on your selected business.

Unit F255: Training and development

Introduction

In this unit, candidates will need to explore issues relating to training and development by constructing a training-and-development strategy for two functional areas within a chosen business context. Candidates' strategies must consider:

- reasons for training staff
- different types of training methods and initiatives
- constraints that can impact on training and development plans.

Candidates need to have access to their chosen business in order to analyse the current skills provision in two functional areas through a skills-gap analysis to allow them to produce an appropriate and relevant training and development strategy within their chosen business context.

Candidates will need to know and understand how to:

- devise a strategy
- understand the business context within which the strategy will take shape
- plan the strategy
- research the strategy and analyse the information that is collected
- produce a plan of action
- evaluating effectiveness.

Candidates will need to be aware of the interdependencies that are apparent in this subject area. For example, an effective training and development strategy may make the workforce more productive in certain aspects of their work. This will have a knock-on effect on departmental objectives where targets may be met more quickly.

Candidates will need to have access to two functional areas and it is therefore suggested that candidates select a medium- to large-size business which has a number of different functional areas. Staff who are willing to take part in a survey or questionnaire are essential if the candidates are to carry out an effective skills-gap analysis. Candidates must not simply describe existing training methods and initiatives used by a business.

Candidates need to research their chosen business, and the wider environment to help inform their strategy development. Surveys on staff, interviews with department managers, discussions with training providers and an appreciation of other training initiatives used by businesses are all excellent ways that candidates can gather useful information to inform their strategy development. Research into the business's aims and objectives, as well as departmental aims and objectives, is also required to ensure that an appropriate and relevant training and development strategy is formed.

Candidates' skills-gap analysis needs to identify the training needs of the workforce to achieve necessary skills and competencies required by the business. In order to do this candidates will need to establish the skills currently required to do the work of the selected individuals in order to compare this against the skills the employees feel they currently have. Candidates must use their research, analysis and what they know about the aims and objectives of their chosen business to produce appropriate training and development programmes for their two chosen functional areas. The training and development programmes need to include an outline of both the training programmes and the types of workshops that would be covered during the course of the training initiatives.

Finally, candidates are required to evaluate critically the effectiveness of their training and development strategy. They will need to consider if their proposed strategy will meet the departmental and corporate aims and objectives of their selected business.

Delivery Plan

General Information

The key to success for this unit will be the candidate's choice of business. Teachers must ensure that the selected business does have two separate functional areas. Candidates will also need access to the personnel working within these two functional areas in order to undertake a skills analysis. It is from this skills analysis that the candidate will formulate their training and development strategy. In order to produce their training and development strategy candidates will need to have undertaken detailed primary research within their selected business.

Reasons for Training Staff

The initial focus of this unit requires the candidates to look at the reasons staff are trained and the benefits that this can bring to an organisation.

The teaching of this could focus on the training the candidates themselves have been through in their part time jobs or work experience.

Different Types of Training Methods

The second section focuses on the different ways in which people can be trained in order to become more efficient within the workplace. Candidates will need to be aware of all the different types of training available in order to construct a well considered and imaginative training and development strategy for their selected business.

The focus of this could again be on candidates' own experiences. Having been taught the different ways in which people can be trained, candidates may wish to reflect on the methods they feel work better for themselves. This could develop into quite interesting discussions, giving the whole group an insight into the different ways people like to learn.

Constraints that can Impact on Training and Development

Within this section candidates need to consider the internal and external constraints that can affect training and development programmes. They will use this theory when undertaking their evaluation of their own training and development strategy.

Candidates may be able to compare the different types of training they have undergone and discuss the reasons why. Their different and varied experiences might have been caused by the constraints affecting the individual businesses they have been involved with. Teachers might also discuss the constraints that are currently affecting training within the school/college.

Task One

This task is the theory behind the reasons for training staff, the different types of training methods used and the constraints that can affect the effectiveness of training. Candidates are advised to refer to the unit specification and use the bullet points found within the assignment brief. The greater the depth of coverage here, the greater the candidates' understanding will be when they come to investigate their chosen business. The knowledge and understanding gained will enable candidates to produce their own relevant and imaginative training and development strategy.

Task Two

This section requires candidates to produce an action plan. Their action plan should clearly outline the aims and objectives of their training and development strategy and how these fit into the framework of departmental objectives and the overall corporate objectives.

Candidates also need to clearly outline which two functional areas they will target and who they will speak to. If appropriate, it might be advisable at this stage to ascertain names and contacts from the candidates to ensure they do actually have excellent contacts who are willing to be part of a detailed skills-gap analysis.

The final stage of the action plan must outline the type of research methods the candidate intends to use in order to collect the required information. The task directs candidates to refer to section 'Researching the strategy and analysing the information that is collected' in the unit specification.

Task Three

Having planned their research candidates are now required to go out and undertake their investigations. Their skills-gap analysis must include:

- analysing the short, medium and long-term business objectives
- analysing existing knowledge and skills available and required

- identifying training needs to achieve the necessary knowledge and skills.

Task Four

This is an important section where candidates must analyse their findings, drawing out all the key information that will be included within their training and development strategy.

Task Five

This section sees the candidates compiling their training and development strategy. Their strategy must make clear reference to their analysis undertaken in task four.

Their training and development strategies for their two chosen functional areas must include:

- an outline of the training programmes
- aims and objectives of the training programmes
- an outline of workshops that would be covered during the course of the training programmes.

Task Six

Within this last section candidates are required to evaluate how the effectiveness of their training and development strategy could be affected by internal and external constraints. Candidates are advised to use the bullet point list for guidance.

In order to achieve the higher mark band candidates must ensure they prioritise the constraints they feel will have the greatest impact on their training and development strategy.

Assignment

A local medium- to large- sized business has approached you to discuss the concerns it currently has about the performance of its staff. The senior management team feels that staff are currently very de-motivated and as such productivity is falling.

The business has a reputation for being very caring towards its staff and one suggestion has been to review the training and development needs of its staff. Before this idea is 'rolled out' throughout the whole organisation the business wants to trial the idea in two functional areas. If the plan proves successful and staff appear happy, more motivated and productivity increases, the concept will be developed throughout the organisation.

In order to undertake this project you need to work through the following tasks.

Portfolio Tip: Throughout the assignment make sure you refer to the unit specification to ensure you include all the information required to achieve the higher mark bands. Within each task the relevant section of the 'What You Need to Learn' of the unit specification has been identified.

Task One (AO1)

In order to achieve this task you are required to investigate and describe each of the three sections outlined below.

(a) Reasons for training staff (Section – 'The business context within which the strategy will take shape')

The following bullet points might help you structure your evidence:

- to meet departmental and overall business objectives
- to increase productivity
- to help introduce new technology
- to improve health and safety
- to create a more flexible workforce, eg job rotation
- to help employees take on new job-roles eg due to promotion or taking on new responsibilities
- to improve job performance and motivation
- to satisfy UK and European legislation in areas such as employment and equal opportunities.

(b) Different types of training methods (Section – 'Production of a plan of action').

The following bullet points might help you structure your evidence.

Methods of training:

- on the job training
- off the job training.

Training programmes:

- job shadowing
- coaching
- computer-based training (CBT)

- in-house courses
- simulations
- external courses.

Training initiatives:

- Investors in People
- appraisals/performance reviews
- Learning Skills Council.

(c) Internal and external constraints that can impact on training and development plans (Section – 'Evaluating effectiveness').

The following bullet points might help you structure your evidence:

- legislation
- competition
- physical resources
- cost implications
- the problems associated with one-off training rather than ongoing training initiatives
- a radical change to a business's aims such as expansion causing a revision of training initiatives.

Task Two (AO3)

As always, detailed and extensive research will be a major part of this assignment. In order to reach the upper mark band you need to show evidence of planning how you will gather the information required for your training and development strategy. In order to achieve this task you are required to draw up an action plan which includes the following points (Section 'Planning the strategy'):

- your aims and objectives for the training and development plan which fits within the framework of departmental objectives and overall corporate objectives
- which two functional areas are you going to target? Who will you speak to in order to gather your research?
- what type of research methods are you going to use to gather the required information?

In order to complete the above bullet points you should make reference to section 'Researching the strategy and analysing the information that is collected' of the unit specification which suggests the types of research you could use.

Task Three (AO3)

Having planned your research above, you now need to set time aside to collect the information you require.

Your skills-gap analysis must involve:

- analysing the short, medium and long-term business objectives
- analysing existing knowledge and skills available
- identifying training needs to achieve the necessary knowledge and skills.

Portfolio Tip: All your questionnaires notes from interviews etc should be placed in an appendices and made reference to throughout task four.

Task Four (AO3)

Having completed your research you need to write up an analysis of your findings, drawing out all the key information that will be included within your training and development strategy.

Task Five (AO2)

Having undertaken all the research and produced a detailed analysis it is now time to write the training and development strategy. Your strategy must make clear reference to your analysis completed in task four and show how your training and development plan meets the needs of the business and two functional areas (Section 'Production of a plan of action').

Your training and development strategies for your two chosen functional areas need to include:

- an outline of the training programmes
- aims and objectives of the training programmes
- an outline of workshops that would be covered during the course of the training programmes.

Task Six (AO4)

This final section evaluates how the effectiveness of your training and development strategy could be affected by internal and external constraints.

The following bullet points might help you structure your evidence:

- legislation
- competition
- physical resources

- cost implications
- the problems associated with one-off training rather than ongoing training initiatives
- a radical change to a business's aims such as expansion causing a revision of training initiatives.

Portfolio Tip: In order to gain the higher mark band you need to ensure you prioritise the constraints you feel will have the greatest impact on your training and development strategy.

Generic information for externally assessed units

Getting to grips with pre-release

Getting to grips with pre-released material

Prepare early
Ensure provisional/final entries are made on time to ensure that the pre-issued case study is received well in advance of the examination.

Check the OCR website
The pre-released case study will be sent to centres via the post, but at the appropriate time a copy will also be available for download from OCR's website. This can be used to prepare electronic teaching resources.

Teach topics in context
From the outset of the course teach candidates the unit content in relation to a real or simulated business. Use visits to local firms, guest speakers, videos, case studies and business websites. This will mean that when the pre-released case study is issued, candidates will be familiar with the approach taken.

Use 'what if' scenarios
These will help candidates develop their knowledge of key unit themes. For example in F243 'The impact of customer service', move beyond the case study and devise other scenarios within that business context. Get candidates to bring their own experiences into classroom discussion.

Build the pre-released case study into a revision programme
Do not simply hand the pre-issue to candidates without guidance and expect them to perform on the day of the examination. Encourage students to research and debate issues identified in the case study. Use the case study to set practice questions for your students.

Do not try and second guess the questions
This is a risky business! Instead focus on content themes and key vocabulary that are flagged up in the pre-issued material. Use these to develop further revision material.

Use pre-released material to set up extension tasks that are focused around the specification content
Extension tasks connected with F242 'Understanding the business environment', for example, might include the identification of external influences which would have a major impact on that particular business, a SWOT analysis, a PEST analysis, completion of financial documentation including cash-flow and break-even calculations and identification of sources of finance.

Examination technique and revision tips

Advice and guidance to be given to candidates	Your role as teacher
Practice time management skills - you need to get to the end of the paper. Do not fall into the trap of writing too much on questions you find easy and running out of time towards the end of the paper. Conversely you must move on should you encounter difficulty with a particular question, you can always come back to it later if time permits.	Give students chance to complete full past papers in timed conditions. The beginning of lessons and plenary sessions can also be used to stress the importance of time eg display a two mark question and ask students to write an answer worthy of full marks in two minutes, or draw a break-even chart in seven minutes.
Understand trigger words; eg 'identify two factors' indicates that you can simply state your two points whereas 'evaluate the consequences' requires a more in depth argument which reaches a conclusion.	Ensure candidates know what is required by the question trigger words. For level marked questions it is essential that candidates can work through from 'stating' to 'explaining', from 'analysing' to 'evaluating'.
Use past papers to improve your examination technique. Ask your teacher to give you feedback not only about subject content but about your exam technique.	Set up practice papers based on specimen papers and the pre-issued case study. Your feedback should highlight how to move up the levels as well as the sufficiency of the content.
Base your revision around themes in the pre-issued case study. Do not question spot - you may be disappointed and this approach may make you blinkered as to what the paper is actually asking you.	Devote some classroom time to working with candidates on developing their higher order skills – how to construct a two-sided argument – how to weigh up - how to make a reasoned judgement.
Once you have completed the examination paper, re-check to ensure you have attempted all questions/sections. If needs be add to your responses by continuing your answers on additional pages. Always indicate on the question page that your answer continues on another page.	Spend some time pulling the pre-released case study apart: 1: Highlight the business profile eg history, location, owners, goals, market, customer profile etc. 2. Identify the key themes that have been flagged in the case study. Themes that can be developed with your candidates.
Ensure you check any financial calculations carefully. Use your skills of estimation to check your answer eg if the answer you would expect is somewhere around 10, and your answer is 102.4, you have probably got the decimal point in the wrong place.	Teach candidates to 'step back' from their answers to numerical questions and check that their answers make logical sense. Encourage them to show their workings; even if their final answer is wrong they can still score some marks.
Devise a revision plan. Stick to the times on your planner.	Have an open door policy for supporting candidates as they prepare for external examinations.

The language of testing

To help your candidates get to grips with the language of testing why not try the interactive trigger word exercise (trigger_words.pdf), matching trigger words to their meanings. For classes without access to ICT facilities the exercise could be done as a 'top and tails' exercise or on cards. For further information on trigger words and how these will be assessed formally in an examination setting please refer to Appendix E of the GCE in Applied Business specification.

Higher order skills

Teachers should be helping candidates to develop their ability to analyse and evaluate evidence from the outset of the course. Remembering the reduced focus on these assessment objectives in the AS unit specifications, it is still vital that candidates begin to develop and enhance these skills at an early stage so that they are then ready for the increased focus on these skills at A2 level.

Helping students understand the four levels of response assessment objectives is, perhaps, best done initially without reference to any specification content. For example you could point to the emergency evacuation notice in the classroom and ask students to '**identify** what it is' (AO1, level 1), you could then ask them to '**explain** its purpose' (AO2, level 2), moving on to higher order skills ask them to '**analyse** the notice' – readability, visibility, layout, location, colour etc (AO3, level 3), finally ask them to '**evaluate** the notice' – summarise its strengths and weaknesses and suggest improvements with explanations to show why these changes are actually improvements (AO4, level 4). Most importantly, get the students to notice that none of these four answers were remotely similar, they are totally different questions. Students need to ensure that they answer the actual questions set in the external examination, and not a similar questions on the same topics.

Once candidates have a working knowledge of the meaning of the terms then a document similar to analysis_evaluation.pdf can be used to help students form analytical and evaluative answers to practice examination questions. Candidates who thoroughly understand the language of testing, and who practice these skills, are more able to demonstrate higher order skills in the external examination setting.

Resources for externally assessed units

Introduction

Assessment objectives are something which candidates need to become familiar with very early on in the course. Successful performance in the classroom will hopefully be mirrored by candidates with successful performance when sitting the external examinations. What follows are some specific teacher resources relevant to the mandatory externally assessed unit F242 ’Understanding the business environment’. The Principal Examiner has chosen the theme ‘cash-flow’ and shows how this theme can be assessed at all four assessment object levels (AO1 –AO4), testing to varying degrees of difficulty.

The hope is that, having considered the example, you will be able to take an **entirely different unit theme (or even unit)** and carry out the same exercise..

Testing at all four levels

F242 ‘Understanding the business environment’

THEME: CASH-FLOW FORECASTS AND STATEMENTS

2.1 Stimulus Material

Molly’s Motifs

Molly started up her own business eight years ago when her children both started school. She wanted to earn some money, be creative and put her mind to work. However, she still wanted to be available during school holidays to take care of her children.

Her business designed motifs which were then sewn on to polo shirts, t-shirts, and sweatshirts which Molly purchased. Over the years Molly had built up a good customer base and always had plenty of work to keep her busy. She ran the business as a sole trader from the family home.

Her daughter was an extremely good hockey player, playing regularly for her school. As a way of support for the school Molly had produced a team sweatshirt for all of the players, which had their name on the back and the school logo on the front. The staff had sweatshirts with ‘coach’ written on the back. The school had just been to a national hockey championship wearing the sweatshirts. Her daughter had done a brilliant public relations job handing out Molly’s details during the hockey championship to try and drum up support for Molly's business. Suddenly, schools from all over the country were interested in Molly's Motifs.

The telephone had been ringing non-stop since the hockey championship and Molly could no longer keep up with the workload. The family decided it was time the business expanded. Molly's son, Kirk, was in the final year of sixth form studying computers and was about to create a website for Molly's Motifs. Simon, Molly's husband, was adamant that it was time the business moved into its own premises as it was currently taking over the house.

Simon found suitable premises which consisted of an office, workshop and storage area located four miles away. The owner wanted a £1 000 deposit and three months' rent (£3 000) in advance. Molly could take over the lease on the first day of September.

Molly decided that she would employ three part-time machinists. Her initial idea was that her employees would work from 9.00 am to 3.00 pm Monday to Friday. Employees would be experienced machinists and paid £7.00 per hour. This would enable Molly to focus on the design work of the motifs. The three employees would then be fully employed on machining the motifs onto the garments.

In order to complete this expansion Molly was going to have to make some capital investment. Molly had undertaken some preliminary research and estimated that she would need to purchase the following equipment:

- second-hand industrial sewing machines - £1 500
- office furniture - £900
- a computer capable of running a website - £1 200
- tables and chairs for the machinists - £250
- kitchen equipment for the employees - £300.

Molly had never borrowed money in order to run her business but was now unsure whether she could expand the business without some form of borrowing. Molly decided to create a seven month cash-flow forecast. June - August is based on her working independently. Sales for August are lower as the family take their ten day holiday during this month. September - December figures are based on the expanded business.

Another concern of Molly's is that currently she runs her business as a sole trader. Molly and Simon are concerned that with all the additional expenditure and responsibility this type of ownership may no longer be the most suitable.

Seven month cash-flow forecast for Molly's Motifs

Income	**Jun**	**Jul**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**
Sales	4760	5160	3870	10100	11100	17400	20800
Total Income	**4760**	**5160**	**3870**	**10100**	**11100**	**17400**	**20800**
Expenditure							
Purchases	2480	2440	2430	4800	5300	8400	10000
Rent				4000			1000
Rates							1200
Wages				2520	2520	2520	2520
Molly's drawings	2000	2000	2000	2500	2500	2500	2500
Distribution costs	200	200	150	400	400	400	400
Electricity				50	50	50	50
Telephone	90			125	50	50	150
General Expenses	50	50	50	75	95	95	95
Total Expenditure	**4820**	**4690**	**4630**	**14470**	**12065**	**14115**	**16565**
Opening Balance	1370	1310	1780	1020		-4315	-1030
Cash in/out flow		470	-760	-4370	-965	3285	4235
Closing Balance	1310	1780	1020	-3350	-4315	-1030	

2.2 Questions and suitable responses

Question	Answer
1 Identify **four** considerations Molly should take into account when using a cash-flow forecast as a management tool. 4 marks AO1 4	One mark for each identification, up to a maximum of four identifications. Issues include: Cash-flow forecasting is only as good as the accuracy of the estimations. (1) Can the business increase sales this dramatically? (1) Has Molly carried out sufficient market research? (1) Has Molly correctly estimated the number of potential new customers? (1) Can the new employees achieve these levels of productivity? (1) Any other valid suggestion.
2 Using the cash-flow forecast, calculate and insert the correct figures into the unshaded boxes. 3 marks AO2 3	One mark for each correct calculation (a) -60 (1) (b) -3 350 (1) (c) 3 205 (1)
3 Using Molly's cash-flow forecast analyse her predicted financial position. 9 marks AO1 3 AO2 3 AO3 3	**Level 1: (1 - 3 marks)** Candidate makes comments about cash-flow forecasting with no reference to Molly's Motifs. **Level 2: (4 - 6 marks)** Candidate explains Molly's Motifs predicted financial position. **Level 3: (7 - 9 marks)** Candidate analyses Molly's predicted financial position. Possible responses include: Eg A healthy cash-flow has more money coming in than going out (L1). The first three months of cash-flow are based on Molly working alone. There is an increase of nearly £5,000 in sales from August to September (L2). Is this realistically achievable in just one month? Would the business need more time to become established? (L3) Eg Most businesses which go through an expansion go through a period of negative cash-flow (L1). Over the period of the next three months sales increase by a further £10 000 (L2). When Molly is working on her own there is a negative outflow in June and August (L2). The large outflow in August is due to the fact that Molly takes ten days' holiday. The large payment of rates in September causes a large negative outflow -£4 370 in September. This causes the bank balance to go into overdraft for the first time (L3). Eg Using Molly's figures after three months the bank balance does turn back into a positive figure of £3,205 (L2). This would indicate that based on Molly's figures the expansion is a financially secure gamble. However Molly has not included her

	capital expenditure (L3).
4 Within the case study Molly has identified the capital items that she will need to purchase in order to expand the business. Using your analysis in question 3, suggest and justify ways in which Molly could raise the finance necessary for this expansion. 9 marks AO2 3 AO3 3 AO4 3	**Level 2: (1 - 3) marks** Candidate describes the available types of funding appropriate to Molly's Motifs. **Level 3: (4 - 6 marks)** Candidate analyses different methods of possible funding for Molly's Motifs. **Level 4: (7 - 9 marks)** With reference to the cash-flow forecast, the candidate recommends and fully justifies their chosen method of funding for Molly's Motifs with reference to the cash-flow forecast. Possible responses include: Candidate suggests a bank loan or bank overdraft (L1) as possible sources of funding to cover the negative balance in September and new capital expenditure (L2). Candidate identifies that as a minimum Molly will need to arrange an overdraft (L2) for the months of September - November. She will need to borrow approximately £4 500. Candidate should also acknowledge that the overdraft will increase costs further. Candidate should calculate that Molly requires £4 150 to purchase capital equipment. This means that the total amount of borrowing comes to £8 650 (approx. figures acceptable) (L3). Candidate recognises that Molly could take out a bank loan for the whole amount over a number of years (L2). 2-5 years would be sensible suggestions. With current interest rates (3%) this would add a further £260 per month to her expenses (L3). A further option could be to take £4 500 on overdraft and then a further £4 000 on a bank loan (L2). This could prove more expensive in the short term but would be cheaper in the long term (L3). The third option is to turn into a limited company (L1) and raise some money by the sale of shares to family and friends (L2). This would mean Molly would lose some control of her business and would need to pay dividends but she would reduce her external borrowing, possibly to nothing (L3). In order to achieve full marks students must make a recommendation that is fully justified (L4). There is no correct answer.

This method of testing a subject topic at all four assessment objective levels (AO1 – AO4) can be applied across all topics in unit F242 'Understanding the business environment'. For candidates who progress to A2, it is equally valid for unit F248 'Strategic decision-making'. For centres entering candidates for the Double Award in Applied Business exactly the same technique can be applied to mandatory unit F243 'The impact of customer service' and optional units F256 and F257 'Business law' and 'Managing risk in the workplace' respectively.

Generic information for internally assessed units

Introductory Programme

Introductory assignment

Due to the nature of the units and the fact that candidates taking GCE Applied Business may come from a number of different backgrounds and learning routes, centres are strongly advised to provide an introductory programme.

The introductory programme would benefit from including the topic areas listed below. All of the themes suggested for the introductory programme are further developed within the AS specification. It should will give all candidates a basic understanding of business in order to start their first unit.

Providing candidates with an overview in the first weeks of the course will give them a basic level of knowledge and understanding before they actively experience the business environment for themselves through a series of authentic work-related contexts.

The introductory programme outlined below also encourages the development of the skills that candidates will need throughout the course - both in terms of their understanding of assessment objectives and the more practical approaches they will need to take to their vocational learning (organisation of time etc).

The introductory programme could be linked to a class cohesion exercise - for example a team building event at one of the major theme parks where a talk on the running of the organisation could be included as part of the educational visit.

Suggested topics for inclusion in the introductory programme are:

- different types of business such as:
    - sole trader
    - partnership
    - private limited company
    - public limited company.
- business aims (long term intentions) that provide a focus for setting objectives

- status
- size
- profitability
- prestige.

- functional areas which exist within any medium/large sized business such as:
  - finance
  - marketing
  - human resources
  - administration
  - ICT.
- stakeholders in a business such as:
  - owners
  - customers
  - suppliers
  - employees
  - community.

Delivery plan

This delivery plan is based on **six** lessons across **two weeks** of a standard school/college timetable. It is only a suggestion and can of course be adapted to suit the particular needs of a cohort at the teacher's discretion.

Topic	Content	Resources	Lesson
Normal centre introduction to the course	Could include introduction to teaching staff, expectations, candidate hand book.	None	Lesson 1
Introduction to the different types of business: • sole trader • partnership • Ltd • plc	Theoretical delivery of the different types of business.	Candidate Worksheet 1	
Candidate activity	Candidates will be applying their theory of different types of business to activity on the assignment sheet.	Activity 1	Homework 1
Business aims and objectives	Theoretical teaching of business aims and objectives.	Candidate Worksheet 2	Lesson 2
Candidate activity	Candidates will be researching the aims and objectives of different businesses.	Activity 2	Homework 2
Skills building exercise one – levels of response	What is analysis? What is evaluation?	Skills Building Exercise 1	Lesson 3
Functional areas	Theoretical coverage of the functional areas in a medium/large sized business: • finance • marketing • human resources • administration • ICT	Candidate Worksheet 3	Lesson 4

Topic	Content	Resources	Lesson
Candidate activity	Candidates will link the theory of the functional areas to a selected business clearly outlining how they are interlinked.	Activity 3	Homework 4
Skills building exercise two and three	**Exercise 2**: Time management skills. What do I do with my time? **Exercise 3**: How to build a portfolio and manage my file.	Skills Building Exercises 2 and 3	Lesson 5
Stakeholders	Theoretical coverage of the different types of stakeholders found in business. Stakeholders' expectations and influence will be covered in this section. Stakeholders will include: • owners • customers • suppliers • employees • community	None	Lesson 6
Candidate activity	Candidates will identify the stakeholders connected to their chosen business clearly illustrating their expectations and influence.	Activity 4	Homework 6

Assignment brief

The purpose of this assignment is to help you learn how to apply the business knowledge that you will gain on this Applied Business course to real businesses. Applied Business is not about keeping knowledge in textbooks!

The tasks require you to investigate and apply your business knowledge and understanding to real businesses. You may use a variety of different businesses as you work through the **four** activities. This will broaden your knowledge base and help you complete the mandatory and optional units later on in the course.

Activity One: Different types of business

Take a walk around your local area. Make a note of all the different businesses that you can find within the immediate area of either your school/college or home.

Design a table to collect the following information:

- the names of all the different businesses
- types of ownership
- what the businesses do.

When you get back to school/college try and decide why each business chose its particular kind of ownership.

Compare your table with other members of the class. Try to identify the most popular form of business ownership in your local area.

If you have been on an educational visit, outline the type of business you visited and state why this type of ownership is suitable.

Activity Two: Aims and objectives

Choose **three** businesses which have an informative and student-friendly website or alternatively businesses that have recently been in the news.

- Identify the aims and objectives of these three businesses
- From your knowledge of the businesses, and the information available, are these businesses achieving their aims and objectives? Justify your answer with examples.

Activity Three: Functional areas

In order to complete this activity you will be required to choose a medium or large sized business and investigate its different functional areas.

- Describe the different functional areas and the role they play in the efficient running of the business
- Explain how these departments work together.

If you are unable to access a medium or large organisation link this activity to your school or college. Focus on non-teaching staff. How does the finance department work? Does the school/college have a personnel department? How is the administration department organised? Does the school/college have a marketing department? Would the canteen count as a production department?

Activity Four: Stakeholders

All businesses have stakeholders. Think about your centre: Who are the stakeholders? Working in small groups you are required to prepare a presentation identifying:

- the internal and external stakeholders involved in your school/college
- the role of each stakeholder group
- how each stakeholder group influences decision-making within the school/college.

Candidate Worksheet 1

Type	Characteristics	Advantages	Disadvantages	Examples
Sole Trader				
Partnership				
Private Limited Company (Ltd)				
Public Limited Company (plc)				

Candidate Worksheet 2

Explain the difference between an aim and an objective. Use an example to illustrate your answer:

Definition of an aim:

....

....

....

....

Definition of an objective:

....

....

....

....

Example:

....

....

....

....

You are required to complete the table over the page. You have been given an aim. You need to think of an objective that would enable a business to achieve the stated aim. The final column asks you to think of a business for which this aim and objective would be realistic.

The first one has been completed for you.

Aim	Objective	Example of a business
To increase profit.	To run a radio advertising campaign during July in order to increase sales by 3% by the end of August.	Zenith Windows
To increase the customer base.		
To increase the amount of money we raise for homeless people.		
To enhance the customer experience.		
To improve staff morale.		
To raise the achievement of students.		
To widen participation of sport within inner city areas.		

Skills Building Exercise 1

The purpose of this fun exercise is to help students identify the different levels of evidence that they will be required to produce across the qualification. The exercise is very simple but does require a certain amount of role-play from the teacher delivering the section.

You need two hole-punches - a two-hole punch and a four-hole punch. You also need a ring binder that has only has a central clip for two holes and another one that has a central clip for four holes.

Stage One: Place both hole punches on the front table. Pretend that you have just arrived from another planet. Get the students to first of all **identify** what these objects are.

Stage Two: Get the students to **describe** the two hole punches.

Stage Three: Get the students to **explain** what the two hole punches do.

Stage Four: You now need to introduce the two ring binders. Show the students what kind of paper they take. Ask the students to **analyse** the usefulness of the two hole punches in relation to the two ring binders.

Stage Five: Lastly, you are only able to have one of the hole punches in the classroom, but have to put paper into both files. Get the students to write an **evaluation** which recommends which hole punch they think you should keep and, most importantly, explains why.

Skills Building Exercise 1 continued

In order to produce the correct type of evidence it is essential that you fully understand the terminology being used. The following exercise will help you gain a better understanding of the following terms.

Identify	
Describe	
Explain	
Analyse	
Evaluate	

Candidate Worksheet 3

In this worksheet you are required to describe the roles different departments play within a business. You are then asked to identify how different departments are interlinked and give examples to clearly illustrate your ideas. For example, marketing will have to negotiate with finance for their marketing budget. Human resources would discuss the finance available for a possible pay award. Try and use a variety of examples for each different department.

Department	Role within business	Interlinked	Example to illustrate
Finance		Marketing	
		HR	
		Administration	
		ICT	
Marketing		Finance	
		HR	
		Administration	
		ICT	

Department	Role within business	Interlinked	Example to illustrate
Human Resources		Finance	
		Marketing	
		Administration	
		ICT	
Administration		Finance	
		Marketing	
		HR	
		ICT	
ICT		Finance	
		Marketing	
		HR	
		Administration	

Skills Building Exercise 2

Failure to meet deadlines will have a knock-on effect throughout the course. If you have not finished one task, how can you possibly manage to keep up-to-date with the next task?

Being at school or college is just one part of your busy everyday life. You may have a part-time job, and will want to have time to spend with friends. The art of being successful in all three aspects is being able to plan your time effectively.

Consider what you do with your time. This should help you plan how and when you are going to study, work and socialise.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Evening							

Skills Building Exercise 3

- File all your work done for this course in ring binders.
- Use subject dividers to divide up the units or use one ring binder per unit.
- Date and title all your notes.
- Highlight key points in handouts for easy reference.
- Keep all your handouts in the correct section. You will need them when you start compiling your evidence.
- When you prepare your final evidence for assessment, make sure you annotate your work with the assessment objectives you are producing evidence for. Your written evidence may not always follow a logical pattern through the assessment objectives. It is therefore important you are able to recognise which elements of each assessment objective you have evidenced within your written work.
- Number the pages of the final copy of your assignment.
- Compile a contents page.
- Make sure your assignment is presented in a logical way in order to facilitate ease of marking.
- Keep a record of all the reference sources you have used. Make a note of all the books, magazines, newspapers, leaflets and websites you use and state what information you gained from each. For example:

Date	**Source** (title of book/magazine/newspaper/leaflet or website)	Information gained
20 Sept	www.ons.gov.uk	Most up to date statistics on family income expenditure.

Make one of these 'source' sheets now, ready for Activity 4.

AS Foreword to Internally Assessed Units

The enclosed support material is broken down into a number of different sections on each of the internally assessed units at AS level.

The philosophy behind this section of the support is to provide teachers with some ideas on how each of the units could be delivered. The ideas are suggestions only and teachers are free to use the material in this section as they so wish.

The support will be broken down under a series of general headings in each of the internally assessed units. These sections are:

- **Introduction.** This reminds teachers about the context of each of the internally assessed units.

- **Delivery Plan.** This provides teachers with a visual overview of how the unit could be delivered. It contains information on the content that must be covered as well as building in a series of assignment based activities which will allow candidates to meet the assessment requirements of the assessment evidence grid in the unit specification. It also suggests the number of hours which may be taken to deliver certain themes within each of the units. it is however only a rough guide and may well be adapted by centres.

- **Delivery Ideas.** This looks at the vocationality of each of the units and suggests further ways in which a vocational flavour can be drawn out both in terms of the content and assignment based activities.

- **Assignment Brief.** This provides candidates with the stepping stones they need to meet the demands of the assessment evidence grid. It is by no means compulsory but in the early days of the new course it will provide a clear structure to the organisation of the candidates work. Over time, centres will of course move away from the assignment and will choose their own method of addressing the assessment criteria. This approach would of course be supported by OCR but it is imperative that any alternative used must be scrutinised carefully by teaching staff to ensure the approach taken is ‘fit for purpose’ and meets the demands of the specification.

OCR has also supplied additional support for the A2 internally assessed portfolio units. It is hoped that centres and candidates’ will find these materials a welcome support tool as they prepare for the delivery of the AS specification in Applied Business.

AS Generic Information for Internally Assessed Units

Introduction

There is no one hard and fast way of delivering each unit and for many centres, it is highly dependent on a range of factors including access to local businesses, geographical location, number of teaching staff etc. What follows is a list of possible approaches that could be taken by centres in the delivery of the AS unit specifications.

Internally Assessed Portfolio Units

Approach 1: Access to real businesses Obviously, if a centre has well established links with a local business then OCR would strongly favour this approach, allowing candidates to experience at first hand real authentic business contexts. However, centres must be careful that the business chosen reflects the requirements of the unit specification. Choosing an inappropriate business may serve as a hurdle to candidates accessing the evidence requirements and the centre may be better advised to choose Approach 2 at the onset.

Approach 2: External links with a business supplemented by classroom activities For this approach, the centre delivers the unit using a dual approach. A speaker from a local business or consultant with particular expertise could be invited into the centre for the day to engage in a meaningful dialogue with candidates on a particular theme. This would then be supplemented by classroom activities as candidates develop their understanding of a particular business context. Unit 2: Recruitment in the workplace would be ideally suited to this approach: eg a HR representative of a company could be invited to the centre to talk with candidates about the HR process. Candidates would then work through the HR process for themselves using a series of jobs connected with the representatives business. Much of the work could be done in a classroom setting using external contacts and information to provide the vocational framework for the unit.

Approach 3: Case studies or assignments - if a centre has particular difficulty accessing an appropriate business the case study/assignment route may then become a serious option. OCR would strongly discourage centres from using this approach for the entire course as it goes very much against the underpinning philosophy of applied learning that for candidates to understand business they must actively experience the business environment for themselves. However, it may be that, in some circumstances, this approach is valid for certain individual units. If this approach is chosen centres must ensure that the case study/assignment material is not limiting in any way. It must have sufficient depth/substance for candidates to meet the demands of the specification whilst also allowing candidates to produce individual authentic evidence. It may help centres to submit their case studies/assignments to OCR using the portfolio consultancy service to gain informal feedback on whether the material they are devising for candidates is fit for purpose before it is issued.

A2 Generic Information for Internally Assessed Units

Introduction

There is no one hard and fast way of delivering each unit and for many centres, it is highly dependent on a range of factors including access to local businesses, geographical location, number of teaching staff etc. What follows is a list of possible approaches that could be taken by centres in the delivery of the A2 unit specifications.

Internally Assessed Portfolio Units

Approach 1: Access to real businesses

Obviously, if a centre has well established links with a local business then OCR would strongly favour this approach, allowing candidates to experience at first hand real authentic business contexts. However, centres must be careful that the business chosen reflects the requirements of the unit specification. Choosing an inappropriate business may serve as a hurdle to candidates accessing the evidence requirements and the centre may be better advised to choose Approach 2 at the outset.

Approach 2: External links with a business supplemented by classroom activities

For this approach, the centre delivers the unit using a dual approach. A speaker from a local business or consultant with particular expertise could be invited into the centre for the day to engage in a meaningful dialogue with candidates on a particular theme. This would then be supplemented by classroom activities as candidates develop their understanding of a particular business context. Unit 13: *Promotion in Action* would be ideally suited to this approach – eg a marketing representative of a company could be invited to the centre to talk with candidates about promotional strategies, which would then be supplemented by classroom activities.

Approach 3: Case studies or assignments

If a centre has particular difficulty accessing an appropriate business the case study/assignment route may then become a serious option. OCR would strongly discourage centres from using this approach for the entire course as it goes very much against the underpinning philosophy of applied learning that for candidates to understand business they must actively experience the business environment for themselves. However, it may be that, in some circumstances, this approach is valid for certain individual units – for example Unit 16: *Training and Development.* If this approach is chosen centres must ensure that the case study/assignment material is not limiting in any way. It must have sufficient depth/substance in order to allow the candidates to meet the requirements of the specification whilst at the same time producing individual authentic evidence. It may help centres to submit their case studies/assignments to OCR using the portfolio consultancy service to gain informal feedback on whether the material they are devising for candidates is fit for purpose before it is issued.

Externally Assessed Units

Candidates now have a range of live papers, including the specimen paper, to draw on when preparing for external examinations. These materials will be vital to candidates in ensuring that they become familiar with examination technique, command words, how to use pre-release material and how to manage time effectively in an examination setting.

Whatever centres can do to enhance the vocational element of this course would be supported wholeheartedly by OCR. These applied A2 specifications are not designed to be taught in a traditional academic way. Should a centre find that this is happening (in the approach that they are taking to unit delivery) then that centre should consider whether a more traditional academic GCE is more appropriate for the learning experience they are trying to provide.

A2 Foreword to Internally Assessed Units

The enclosed support material is broken down into a number of different sections on each of the internally assessed units at A2 level.

The philosophy behind this section of the support is to provide teachers with some ideas on how each of the units could be delivered. The ideas are suggestions only and teachers are free to use the material in this section as they so wish.

The support will be broken down under a series of general headings in each of the internally assessed units. These sections are:

- **Introduction** – This reminds teachers about the context of each of the internally assessed units.

- **Delivery Ideas** – After providing a general overview of the unit this section then looks at the tasks in the assignment brief – providing information as to how they can be met and how they link into the evidence assessment grid.

- **Assignment Brief** – This provides candidates with the stepping stones they need to meet the demands of the assessment evidence grid. It is by no means compulsory but in the early days of the new course it will provide a clear structure to the organisation of the candidates' work. Over time, centres will of course move away from the assignment and will choose their own method of addressing the assessment criteria. This approach would of course be supported by OCR but it is imperative that any alternative used must be scrutinised carefully by teaching staff to ensure the approach taken is 'fit for purpose'.

It is hoped that centres and candidates will find these materials a welcome support tool as they prepare for the delivery of the new A2 specification in Applied Business.

Analysis evaluation template

Many of the high mark questions ask you to ‘analyse’ or ‘evaluate’. It is important that do not ignore these trigger words when answering the question as doing so will limit the number of marks you can gain, even if the subject content is extremely good.

Analyse

(Or consider, explore, explain the advantages and disadvantages of)

Requires you to consider two sides of an argument or work out the consequences of a course of action.

Key words/phrases that can help you with this are:

advantage	this might	and therefore
disadvantage	because	pro
bad idea	one reason	con
a likely consequence	benefit	good idea
a repercussion	drawback	on one hand
on the other hand	strengths	knock-on effect
which may lead to	weaknesses	this might
which would mean that	this would	and then
this leads to	because	so that
would allow them to	however	due to

Evaluate

(Or discuss, assess the extent to which, advise, recommend, justify)

Requires you first to analyse and then make a decision. You must give detailed reasons for your decision.

Key words/phrases that can help you with this are:

therefore they should	As a consequence	Overall
ought to	Must take account of	in the short run
must consider that	weighing up	in the long run
must not forget that	more important than	if ... then
more likely that	depends upon	in conclusion
I recommend ... because	more important it	a higher priority
is more important than	if not then	as a consequence
if that happened then	need to monitor	on balance
further research would	most critical	greater than
most important factor	judging both sides	matters more

Ask your teacher for an ‘evaluation’ type question, write it in this box. Now try and compose an answer using this sheet to help you, tick off the phrases you use as you go. How many can you use in one answer? Remember in order to evaluate you must analyse first.

A2 Assessment Scenarios

What follows are a series of theoretical assessment scenarios that try to highlight to you, the teacher/lecturer, how one should set about awarding a mark band for each of the A2 coursework units. Obviously, the final mark awarded will need to reflect the breadth and depth of evidence provided by a candidate but the following scenarios should at least start to make one think about assigning mark bands and marks to particular assessment objectives.

A solution for these theoretical scenarios will be provided on OCR's e-list. To subscribe to the e-list and download this solution please use the attached hyperlink – http://community.ocr.org.uk/lists/listinfo/applied_gce_business .

Unit 10 (F249): A Business Plan for the Entrepreneur

John has produced a business plan that focuses on the launch of a mobile lunchtime sandwich bar in his local city centre. The first twenty pages of John's evidence are purely theoretical as he considers the reasons behind why a business plan is created, the different parts of a business plan and the various constraints that can impact on the successful implementation of any generic business plan. The latter section is presented as a spider diagram highlighting possible constraints with supplementary text underneath.

John then provides a short synopsis of his business idea before moving into researching it in more detail. His evidence is split logically into a number of different sections – each section focusing on a different aspect of the business idea (ie marketing, production, finance and human resources).

John's marketing and production sections are particularly strong. In the marketing section John includes evidence of questionnaires directed at local businesses in the area that may make use of his mobile sandwich bar. He also makes extensive use of marketing models as he analyses the business environment. John is not aware of any direct competitors/rivals in his local area so has not really focused on this issue. John's production section also displays real depth and is clearly related to his findings from his marketing section. John has identified a series of products he wishes to sell and then sets about formulating a production plan for these products. His research in this area is both web-based and is gathered from a focus group which John organises with a local café who has experience in dealing with production related issues. In both the marketing and production sections John focuses on targeting his research and analysis directly into the development of his business plan.

The finance and human resources section, however, are more underdeveloped. In relation to finance John's financial documents are littered with numerous arithmetic errors and there is no evidence to indicate where the figures John is using have come from. Many of the financial assumptions John makes are unsupported which bears stark contrast to the marketing and production sections. The human resource section is also extremely weak with only the number of employees needed being considered. No other human resource requirements are considered.

John then produces a business plan template – containing the key elements from his research and analysis. The business plan is very professional in appearance, uses an appropriate level of language and has few problems with grammar and spelling. Most of the information John uses in his plan is linked to his original research although the finance and human resources sections are weak.

John's final section then discusses the constraints that could impact on the successful implementation of his business plan. This is a detailed section of evidence and is comprehensive and in-depth. Legal, financial, social, environmental, technological and competitive issues are considered in great detail and John ensures that each issue is directly applied to his specific business plan rather than talking about the issues on a purely generic level. John prioritises the bullet points and explains clearly which constraints are likely to impact on his business plan more than others. There are very few errors of grammar, punctuation and spelling in this final section of evidence.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 11 (F250): Managerial and Supervisory Roles

Glenda has an excellent business context for this unit as she chooses to use her part time job – working as a sales assistant in a local high street Virgin Megastore. She has decided to produce a report showing how her line manager, Jill, approaches her current managerial/supervisory role at Virgin.

Glenda's evidence for A01, A02 and A03 is combined. Her evidence for A01 is a combination of generic theory and evidence directly applied to the chosen business context. Throughout the portfolio, it is clear Glenda understands different types of management/supervisory functions, different types of management/supervisory styles and management theories. However an understanding of factors which influence the effectiveness of a management/supervisory role cannot be found.

Glenda's research of the approach taken by Jill, her line manager, to her supervisory/management role is comprehensive and in-depth. Glenda begins by giving a brief history of Virgin Megastores before indicating the organisational structure of the store in which she works. She uses questionnaires with company staff, work-shadowing of Jill for a day and face to face discussions with her line manager to build up a picture of how Jill approaches her managerial/supervisory role. Glenda looks into the different types of management/supervisory functions that Jill performs, not only on a day to day basis but more strategically as she looks ahead a year or so into the future. To find out the type of management style Jill seems to adopt, Glenda gets her line manager to carry out a series of psychometric tests – this is done with regard to both skills/competencies as well as motivational factors. Glenda analyses the results of this on-line testing as the profile of her line manager's approach continues to take shape. Glenda uses secondary research to read up on management theorists and then tries to link these management theories to the role that Jill performs on a day to day basis. During the face to face discussions with Jill, Glenda sets up a number of scenarios faced by her line manager in a typical week so that she can ascertain how certain situations are dealt with – this all continues to build up Jill's profile of how she performs her manager/supervisor role in Virgin Megastores.

Once the information has been collected and analysed by Glenda, she then produces a brief synopsis document, highlighting the key factors behind Jill's approach to her managerial/supervisory role. This summary document is taken directly from the results of Glenda's research and analysis and shows high levels of application. Again, still no mention is made by Glenda of what factors influence the effectiveness of Jill's management/supervisory role.

Glenda makes no attempt to consider the factors which can influence the environment in which a manager/supervisor performs their role.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 12 (F251): Launching a Business Online

Mark has decided, for his e-commerce strategy, to design the front end to a web-site that would sell DVDs on-line to the general public.

Marks first section to his portfolio is rather disappointing. He chooses only to identify how e-commerce provision could be used in his chosen business idea. He only identifies the possible benefits of e-commerce provision to his business venture and omits drawbacks completely. Mark also only identifies the issues involved in setting up and running a web-site although this evidence is strengthened at a later date when he considers issues to do with the front and back end of his chosen web-site.

Marks portfolio dramatically improves however when he begins to research his chosen business venture. He begins by planning his actions carefully – to plan the types of research he will carry out and the type of information he is hoping to collect, the need to analyse the gathered data to inform the development of the front end of his web-site, the need to produce a series of concept boards indicating how the front end to his web-site would work and an evaluation of how he would have to manage back-end issues connected with the launch of his web-site. This planning stage provides a clear structure to Mark's work. Mark begins by producing a questionnaire to find out from the general public what they would be looking for in a web-site that sells DVDs. He presents the findings from his research in a variety of diagrammatical forms before analysing the results to draw out key themes that could be used in his own e-commerce strategy. Mark also arranges a visit to a local web-site designer (through a local contact) in which he tries to ascertain what kind of features might attract customers to his particular web-site. Finally, Mark carries out some web-based research looking at a range of similar web-sites that sell DVDs. He opts for a ranking system in which he tries to rank the web-sites based on appearance, functionality, user-friendliness, organisation of prices, descriptions of goods and language options etc. It is clear that

Mark is hoping to draw on this extensive research and analysis when designing his own front end to his chosen web-site.

Mark then produces a series of concept boards and presentational slides to show the front end to his chosen web-site. The concept boards/slides are extensively linked to Mark's research and analysis and are wide ranging, covering all manner of issues including aesthetics, functionality and methods of shipment to customers, to name but a few examples. This section is a thorough and comprehensive piece of work undertaken by Mark and one easily gets a feel for what Mark's front end web-site would look like and how it would function.

Finally, Mark considers what measures he would take to deal with the manageability of the back end of his web-site. Mark uses the concepts in the WYNTL as section headings and manages to successfully prioritise which concepts are more important than others. There is sustained evaluation with the areas of security and legislation being considered and evaluated in real depth by Mark as to what impact they could have on the manageability of his web-site.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 13 (F252): Promotion in Action

Karen in her AS unit in year 1 (*Creating a Marketing Proposal*) decided to create a marketing proposal for a new diabetic chocolate bar. In year 2, Karen has decided to use the diabetic chocolate bar as a basis for her promotional strategy.

The first section to Karen's work aims to address the criteria requirements for AO1. Using a table, she identifies the various forms promotional activity can take and underneath shows an understanding of how and when each is used. Karen then produces a spider diagram identifying the internal and external factors that can influence promotional activity with an in-depth explanation to follow. This section is a carefully planned and comprehensive piece of work.

Karen then moves into researching her two promotional media opting for a TV advertisement and a trial pack to be handed out at her local train station over the period of a week. Taking the TV advertisement to begin with Karen firstly holds a focus group during which she attempts to find out potential customers attitudes to TV adverts – especially in the confectionary market. Findings from this focus group are then written up and analysed in a small report. Karen also watches a number of different TV adverts over a two week period which are looking to promote different food and drink items. She ranks the adverts alongside a set of common criteria (including aesthetics, message, fitness for purpose and communication) and analyses each advert in turn. In terms of the trial pack Karen produces a questionnaire and asks the general public a series of questions with regard to how it should be presented, what information should accompany it and what would make a customer having received it for free go on and buy it on a more regular basis. Again it is obvious that Karen has put a lot of effort into targeting her research and her analysis and interpretation of it is thorough and comprehensive.

Karen then produces her two promotional media. Firstly, she produces a concept board for her TV advertisement with an in-depth explanation of its key features. Karen also produces an example trial pack of her diabetic chocolate bar. This includes a drawing of the wrapper to be used and the flyer which will accompany it. In both cases there is extensive linkage back to Karen's research and analysis as each feature of Karen's promotional media has been carefully considered in relation to the impact it will have on the target audience.

Karen's final section considers the effectiveness of the chosen promotional strategy taking into account possible internal and external influences. Although Karen does consider internal influences in some depth prioritising which of them is likely to impact on her strategy more than others, her evaluation of external influences is more limited. Karen does identify the impact that external influences will have but does not prioritise evidence or offer any real evaluative comment.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 14 (F253): Constructing a Financial Strategy

It is clear Peter has made use of the OCR scenario for this unit which he uses to achieve the assessment criteria for this unit. To begin with Peter focuses on addressing the evidence criteria for A01. He begins by identifying the reasons behind keeping financial records and the consequences of not producing accurate financial records. These sections are however underdeveloped. Peter does then go onto provide an in-depth rationale of the key processes involved in creating a series of final accounts. This is done via a flow chart with an in-depth explanation of each part of the process.

Peter then moves onto the next part of his assignment – producing a series of financial information from the tasks supplied in the OCR stimulus material. Immediately it is clear that Peter has struggled. There are significant errors and weaknesses throughout the financial data and they are not laid out in an appropriate format. The data is jumbled and there is no evidence that Peter has rechecked his figures to resolve any errors/inaccuracies that have occurred. It really would have helped Peter to have researched different templates and an appropriate layout for aspects of his financial information before he began this section of work.

Peter then moves onto using financial ratios to analyse the financial performance of the given business. This does prove somewhat problematic given the errors in Peter's financial data as he suggests that the business is performing well which is the inverse of what correctly completed final accounts would have told him. Nonetheless, Peter's ratios are correctly calculated based on his own figures and he does provide an extended piece of prose on the financial position of the given business showing high levels of analysis. There is potential for more financial ratios to have been used which is the only other weakness that could be levelled at Peter's submission of work.

Peter then moves onto the final part of the unit requirements – considering how the business in the given context should plan its financial activities in the future. This section although using inaccurate financial data created by Peter is still a significant and lengthy piece of work. Peter has evaluated what the business should do – following given prompts in the OCR stimulus material. Within this section Peter has prioritised the types of action the business should take and has referred back to his financial information and analysis as and when deemed appropriate. This final section is an in-depth and extensive piece of critical evaluation.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 15 (F254): Launching a New Product or Service in Europe

William has chosen to use the subject of regional food as the business context for this unit. Living in Cornwall and having a pasty shop in his vicinity he has decided to investigate the possibility of expanding the business and opening up a shop in southern Italy selling regional Cornish pasties along with a range of other traditional British cold and hot snacks.

William begins by producing fifty pages of evidence which highlight in detail the main characteristics of the EU market including a demographic profile, main imports and exports, income level and labour skills and employment rates. He also shows the potential impact of European involvement on a UK business using guidelines as provided in the WYNTL section.

William's next job is to research and analyse the issues that need considering for his proposed expansion. He begins by providing an overview of his local business as he profiles its main characteristics – vital if William is to consider such things as ICT requirements, staffing needs etc for the proposed expansion. He then brainstorms the kind of areas that need considering for a move into Europe and then holds a face to face discussion with the owner of the local shop to gain his perspective on the many issues raised. William also approaches another computing retail store in his locality who he knows has a retail outlet in France and questions the staff as to the many issues they faced setting up abroad with a key focus on the financial implications. Finally, William carries out some web-based research into areas such as legislation, possible regional monetary assistance, government grants and financial support. Having collected a wealth of information William then analyses the data he has collected in some depth as he looks to formulate his expansion strategy for the pasty shop.

William then produces a report outlining the expansion strategy he would propose for the business. The strategy is broken down into a dozen or so sections (taken from the WYNTL) with William suggesting how the local business needs to respond in relation to each of the designated areas. The report is in-depth and comprehensive and it is clear that William has really got inside his business and focused on the issues it needs to consider should expansion be considered the way forward. All of the rationale in William's report can be traced back to his extensive research and analysis as he lays out a comprehensive and in-depth strategy for the pasty shop.

Finally, William is expected to critically evaluate the likely effectiveness of his expansionist strategy. At this point William's evidence falls down and although he identifies possible ways in which external influences, such as a change in market conditions in the UK/Europe, would affect his strategy very little else is offered. There is no prioritisation of evidence or selection of appropriate lines of argument taking place in this final section of work.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Unit 16 (F255): Training and Development

Keith has decided to base his training and development strategies on his local part time business in which he works a few evening shifts every week. He has decided to choose customer service and finance as the two functional areas for which he will devise training and development strategies.

Keith begins by producing a short report to meet the evidence requirements for A01. The report is, however, brief and only identifies the reasons behind training staff and the different types of training available. His section on constraints that can impact on training and development plans is more developed.

Keith, working in his chosen business, is able to gain a real insight into the training and development process. His research on customer service is excellent. He carries out questionnaires with members of the sales staff as part of his skills gap analysis. He holds a face to face discussion with the manager of the store to research the short, medium and long term objectives of the business and how training needs will need to meet these objectives. Keith also attends a customer service training evening and writes a report on his findings from the training meeting. Finally, Keith carries out web based research as he investigates the wealth of training initiatives and programmes that are available to a business. Keith expends so much effort on this particular functional area that when it comes to the second functional area, finance, Keith's evidence drops markedly in quality. There is no evidence of Keith questioning members of staff in the Finance Department nor is this area discussed in the meeting with senior management.

Keith's next task is to establish a plan of action – a training and development strategy for each of the functional areas. For customer services this proves to be an easy task. Having researched the area in depth and analysed his findings Keith is easily able to link his selected information into a training and development strategy. He produces an outline of the training programmes he would like to run, an idea of their contents and what they should set out to achieve. This evidence is in stark contrast to the financial side of the training and development strategy which is extremely limited and lightweight due to the inadequacies of Keith's research and analysis in this area. There is a real sense that Keith has not given this functional area the time it deserved.

Keith's final section of work considers the effectiveness of his strategy in meeting departmental and corporate aims and objectives. Despite earlier weaknesses Keith is very strong on the effectiveness of the customer service half of his training and development strategy providing both short and long term evaluation as to whether or not departmental and corporate aims and objectives will be met. The weaknesses on the finance side does however continue to weaken the overall quality of the work with evaluation on this side of the strategy being virtually non-existent.

Question: If you as an assessor received the following submission of work from a candidate what mark band would you be likely to give in relation to each assessment objective?

Assessment Objective	Mark Band
A01	
A02	
A03	
A04	

Annotation Guidance - Getting Evidence Ready for Formal Moderation

For those teachers who were familiar with the old VCE/GNVQ approach to internal assessment, the criteria building approach allowed for a straightforward annotation system. On either a contents page or in the main body of evidence itself candidates and the teachers could easily demonstrate where particular criteria been achieved. In this specification, this form of annotation will have to be revised given the holistic integrated nature of the portfolio building process. What follows are key guidelines on the annotation system one would like to see your centre implement when delivering the new course.

Guideline 1 - Good working practices

As a teacher you need to ensure that you get candidates into good working ethics early on. It is important that candidates start to organise their work into a logical sequence to make both internal assessment and then formal moderation run much more smoothly. For example for Unit 1: Creating a marketing proposal you may want to give candidates certain section headings at the start of the course. These sections may include:

- A section that contains the theoretical coverage of marketing objectives, functional areas of a business and their supporting role and the marketing mix. This could also include candidate's' class notes and class exercises as candidates develop their knowledge and understanding of key unit themes.

- A section that sets the scene and outlines the vocational context candidates have chosen for their new product/service.

- A section that contains candidate's research and analysis of their results.

- A section that contains the candidate's presentation

- A section that allows candidates to demonstrate their evaluative/judgmental skills.

Guideline 2 - Annotation

If one takes Unit 1 and the first assessment objective, the teacher needs to make an overall best fit judgment about which mark band best fits the candidate's level of knowledge and understanding of key unit themes. Although the teacher may make lots of smaller decisions on particular paragraphs of text, ultimately they need to look at the evidence as a whole and make one overarching decision.

To help a teacher arrive at this final decision it may be that as they start reading through the candidate's evidence they start to put adjectives next to key points in the right hand margin of a candidates work -adjectives taken straight out of the evidence grid and Appendix A of the specification (pages 109-111).

For example if the teacher feels the candidate obviously knows and understands their material to quite a sophisticated level words such as "clear",, "comprehensive", "appropriate", "extensive"

”effective”, “breadth and depth” need to be used. Similarly for weaker knowledge and understanding the teacher may revert to terms such as ’evidence requires further clarification and elaboration’, ‘unfocused’, ‘over-theoretical’, ‘irrelevant’, ‘no flow or cohesion to evidence’.

By carrying out this form of annotation the teacher will then, at the end of the candidate’s evidence, be in a much better position to make the casting professional judgment for this and other assessment objectives. Teachers will be able to look at the types of descriptive adjectives they are using to sum up the candidates ability in analysing and evaluating before assigning the evidence to a particular mark band. Without annotation of a candidate’s evidence this process will become virtually impossible!

Having completed the annotation of the work the teacher must then ensure that a unit recording sheet (URS) is completed in its entirety for each candidate. There will be a section left blank for teachers to write their commentary on the candidate’s submitted evidence. This should really be a summation of the teachers thought process and annotation descriptors they have been using when assessing the candidates evidence. The moderator will then hopefully be able to look at the teacher’s comments, map their comments back to the annotation used by the teacher and then confirm the mark as awarded by the centre.

Obviously this whole process will only work if a centre gets into effective annotation procedures early on. At the end of the day when the portfolio evidence is submitted to a moderator as part of a sample request it must be as transparent as possible. The moderator needs to understand where the centre is coming from, needing the annotation and comments on the URS to almost be a road map which guides them through the evidence in a logical and methodical manner. Clearly, if the candidates has produced jumbled, mixed up evidence to begin with this will only put unnecessary pressure on the both the teacher who has to try and work through the evidence but then the moderator who is trying to establish the reasoning/thought process of the teacher concerned - a thankless task when the evidence does not appear to flow in a cohesive manner.

Guideline 3 - Feedback

Of course teachers cannot simply rely on their initial teaching at the start of a unit being taken on board by candidates and then leaving them to their own devices. Building a portfolio of evidence is very much a staged process with a teacher having a vital role to play in their interaction with the candidate. The teacher needs to offer support throughout the portfolio building process offering advice and information when needed as well as pointing out any serious concerns as the evidence begins to take shape. Unlike the old VCE specifications teachers will not be able to feedback on certain isolated criteria - they will need to feed back in a more holistic way to candidates pointing out weaknesses in particular skill areas. For example, if in a teacher’s professional opinion a candidate has been felt not to show enough sophistication in their level of knowledge and understanding it may be that the candidate will need to go back and carry out additional exercises to enhance the evidence they are presenting. It is clear this revised form of feedback should be carefully considered by teaching staff when planning for and implementing the specifications.

OCR has provided exemplification of Unit 1: Creating a marketing proposal with clear guidance on the annotation system. It is hoped that centres will use these same annotation techniques as those provided in the unit exemplification, when assessing their own candidate’s evidence.

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