QUALIFICATION SPECIFICATION

gateway



Diploma in Procurement (Level 5)





This qualification specification covers the following qualification:

Qualification Number	Qualification Title
601/3929/8	Gateway Qualifications Level 5 Diploma in Procurement

Version and date	Change detail	Section/Page Reference
1.0 (Jan 2020)	n/a	n/a
1.1 (June 2020)	Front, back covers and RPL statement updated.	n/a
1.2 (April 2021)	Qualification approval from Qualifications Wales removed.	Pg6 and 7
1.3 (Jan 2023)	Removed address and changed back cover	Page



About this qualification specification

This qualification specification is intended for tutors, assessors, internal quality assurers, Centre Quality Managers and other staff within Gateway Qualifications recognised centres and/or prospective centres.

It sets out what is required of the learner in order to achieve the qualification. It also contains information specific to managing and delivering the qualification including specific quality assurance requirements.

The guide should be read in conjunction with the Gateway Qualifications Centre Handbook and other publications available on the website which contain more detailed guidance on assessment and verification practice.

In order to offer this qualification, you must be a Gateway Qualifications recognised centre.

If your centre is not yet recognised, please contact our Development Team to discuss becoming a Gateway Qualifications Recognised Centre:

Telephone: 01206 911211

Email: enquiries@gatewayqualifications.org.uk

Website: <u>www.gatewayqualifications.org.uk/recognition</u>



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1. Qualification Information

1.1 About the qualification

The qualifications have been approved by the Office of Qualifications and Examinations Regulation (Ofqual) that regulates qualifications, examinations and assessments in England.

The Gateway Qualifications Level 5 Diploma in Procurement has been developed in consultation with various stakeholders including the relevant Sector Skills Council (Skills for Logistics) and Training Providers. The qualification is supported by employers including a government agency and a local police authority.

This qualification will be suitable for learners in the following roles.

- Buyer
- Procurement / purchasing executive
- Procurement specialist
- Contract officer
- Supply chain / inventory / logistics analyst
- Supply chain / inventory / logistics planner.
- Assistant Category Manager
- · Category Specialist
- Contracts Engineer
- Procurement Officer
- Supplier Relationship Specialist

1.2 Objective

The objective of the Gateway Qualifications Level 5 Diploma in Procurement is to confirm occupational competence of those in a procurement role.

1.3 Funding

This qualification is not in scope for public funding.

1.4 Geographical coverage

The qualifications have been approved by Ofqual to be offered in England.

If a centre based overseas (including Scotland) would like to offer this qualification, they should make an enquiry to Gateway Qualifications.

1.5 Progression opportunities

The qualifications form part of a suite of Procurement qualifications at Levels 3, 4, 5 and 6.

The progression opportunity for this qualification is to the Level 6 Diploma In Procurement.



1.6 Relationship with other frameworks

The Gateway Qualifications Level 5 Diploma in Procurement provides a significant amount of knowledge, understanding and skills development that underpins occupational competence in the Procurement and Supply sector.

Relevant units within the qualification have been carefully developed according to the relevant standards as appropriate and/or in conjunction with users of the qualification.

1.7 Equality, diversity and inclusion

It is Gateway Qualifications' aim that there shall be equal opportunities within this organisation and in all the services it provides and within its recognised centres and via the services they provide and so meet the organisation's legal responsibilities to prevent discrimination.

In particular it is the organisation's intention that there should be no discrimination on the grounds of a protected characteristic including age, disability, gender assignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, sexual orientation. It is acknowledged that this is not an exhaustive list.



2. Learner Entry Requirements

2.1 Key information

Qualification Titles	
Age	The approved age range for these qualifications is: 18+ and 19+.
Prior qualifications or units	There is no requirement for learners to have achieved prior qualifications or units. However, learners may have completed the Level 4 Diploma in Procurement.
Prior skills/knowledge/ understanding	The prior skills knowledge and understand that a learner should have to undertake this qualification are not specified. However, learners undertaking the Level 5 Diploma in Procurement are likely to have experience in the work place in a day to day purchasing role.
Restrictions	There are no restrictions to entry.
Additional requirements/guidance	There are no additional rules or guidance regarding learner entry requirements.

2.2 Access to qualifications for learners with disabilities or specific needs

Gateway Qualifications and recognised centres have a responsibility to ensure that the process of assessment is robust and fair and allows the learner to show what they know and can do without compromising the assessment criteria.

Gateway Qualification has a duty to permit a reasonable adjustment where an assessment arrangement would put a disabled person at a substantial disadvantage in comparison to someone who is not disabled. Please refer to Section 4.11 Access Arrangement, Reasonable Adjustments and Special Considerations for further details

2.3 Recruiting learners with integrity

It is vital that centres recruit with integrity with regard to qualifications. Centres must ensure that learners have the correct information and advice on their selected qualification(s) and that the qualification(s) will meet their needs.

The recruitment process must include the centre assessing each potential learner and making justifiable and professional judgements about the learner's potential to successfully complete the assessment and achieve the qualification. Such an assessment must identify, where appropriate, the support that will be made available to the learner to facilitate access to the qualification(s).



3. Achieving the Qualification

3.1 Achievement methodology

The qualification will be awarded to learners who successfully achieve an approved combination of units through a Portfolio of Evidence that has been successfully verified and monitored through Gateway Qualifications' Quality Assurance process.

Achievement is therefore determined by successful completion of unit assessment with no further requirement for additional/summative assessment.

3.2 Qualification Size

Qualification Title	Total Qualification Time	Guided Learning Hours	Credit Value
Gateway Qualifications Level 5 Diploma in Procurement	600	300	60

Total Qualification Time is the number of notional hours which represents an estimate of the total amount of time that could be reasonably expected to be required for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of the qualification.

Total Qualification Time is comprised of the following two elements:

 the number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and

an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place by – but, unlike Guided Learning, not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

3.3 Qualification Structure

The knowledge, skills and understanding that will be assessed as part of the qualification are set out within the unit specifications. These include the learning outcomes and associated assessment criteria. To obtain unit information, please contact Gateway Qualifications who will enable access to our unit library.

For information on Recognition of Prior Learning/Exempt and Equivalent units please see section 3.2 Recognition of Prior Learning (RPL)/Exemptions/Equivalencies



Gateway Qualifications Level 5 Diploma in Procurement

To achieve the Gateway Qualifications Level 5 Diploma in Procurement, learners must achieve a minimum of 60 credits including five mandatory units totalling 30 credits from group M (Mandatory), a minimum of four units worth at least 20 credits from group OA and remaining credits from either group OA or group OB.

Unit Reference Number	Title	Level	Credit Value	GLH	Subject Sector code	Group Name
L/506/5288	Develop and Implement Operational Plans for Procurement	5	6	25	15.3	M (Mandatory)
J/506/5287	Work Productively with Colleagues and Stakeholders	5	6	30	15.3	M (Mandatory)
L/506/5274	Plan Change in Own Area of Responsibility	5	6	30	15.3	M (Mandatory)
A/506/5285	Improve the Performance of the Supply Chain	5	6	30	15.3	M (Mandatory)
F/506/5286	Manage Risk in Procurement	5	6	30	15.3	M (Mandatory)
K/506/5282	Manage Supplier Relationships	5	5	30	15.3	OA (Optional Units A)
H/506/5281	Manage the Flow of Supplies in the Supply Chain	5	5	30	15.3	OA (Optional Units A)
H/506/5278	Plan the Storage of Supplies in the Supply Chain	5	5	30	15.3	OA (Optional Units A)
D/506/5263	Evaluate Supplier Performance	4	5	25	15.3	OA (Optional Units A)
T/506/5284	Develop a Category Management Strategy	5	6	35	15.3	OA (Optional Units A)
M/506/5283	Manage Procurement for a Category of Expenditure	5	6	35	15.3	OA (Optional Units A)
D/506/5280	Project Management in Procurement	5	6	30	15.3	OA (Optional Units A)
K/506/5279	Develop Sustainability in the Supply Chain	5	6	35	15.3	OA (Optional Units A)



Unit Reference Number	Title	Level	Credit Value	GLH	Subject Sector code	Group Name
J/506/5273	Manage Inventory	4	6	35	7.2	OA (Optional Units A)
D/506/5277	Operations Management Processes	5	6	35	15.3	OA (Optional Units A)
R/506/5261	Schedule the Flow of Supplies in the Supply Chain	4	4	25	15.3	OB (Optional Units A)
R/506/5275	Provide Leadership and Direction for Own Area of Responsibility	5	4	30	15.3	OB (Optional Units B)
R/506/5289	Recruit Staff in Own Area of Responsibility	5	4	25	15.3	OB (Optional Units B)
J/506/5290	Promote the Use of Technology within an Organisation	5	6	30	15.3	OB (Optional Units B)
Y/506/5276	Quality Management	5	6	35	15.3	OB (Optional Units B)
L/506/5291	Developing Collaborative Relationships with Other Organisations	5	7	30	15.3	OB (Optional Units B)

3.4 Recognition of Prior Learning (RPL)

Recognition of Prior Learning (RPL) provides learners and Centres with an alternative assessment method by which a learner's previous achievements can meet the assessment requirements for a unit/qualification through the knowledge, understanding or skills that they already possess and so, do not need to develop these through a course of learning.

It enables the recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable to contribute to a unit, units or a whole qualification according to the RPL criteria for a given qualification.

The recognition of prior learning is permitted for this qualification and includes the prior attainment of units on a qualification offered by Gateway Qualifications, e.g. where a learner progresses from a smaller qualification to a larger qualification and where the qualifications have shared content such as an Award, Certificate and/or Diploma.

Centres should refer to the Gateway Qualifications' Recognition of Prior Learning policy and follow the process available on the website.



3.5 Links to other qualifications

The qualifications form part of a suite of Procurement qualifications at Levels 3, 4, 5 and 6.

The progression opportunity for this qualification is to the Level 6 Diploma In Procurement.



4. Assessment and Quality Assurance

The following are in addition to the standard assessment and quality assurance requirements set out in the Gateway Qualifications Centre Handbook.

4.1 Method of assessment

The method of assessment for the qualifications is through a portfolio of evidence.

Learners must have access to a relevant workplace as there is a requirement for assessment to be undertaken in the workplace.

4.2 Assessment materials

There are no specific assessment materials provided for this qualification.

4.3 Assessment language

The qualifications are assessed in English only.

4.4 Access Arrangements, Reasonable Adjustments and Special Considerations

It is Gateway Qualifications' aim that there shall be equal opportunities within this organisation and in all the services it provides and within its recognised centres and via the services they provide and so meet the organisation's legal responsibilities to prevent discrimination.

In particular it is the organisation's intention that there should be no discrimination on the grounds of a protected characteristic including age, disability, gender assignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, sexual orientation. It is acknowledged that this is not an exhaustive list.

Gateway Qualifications and recognised centres have a responsibility to ensure that the process of assessment is robust and fair and allows the learner to show what they know and can do without compromising the assessment criteria.

Special Considerations

Requests for special consideration should be submitted as soon as possible. Please refer to the Reasonable Adjustments and Special Consideration Policy



5. Centre Recognition and Qualification Approval

5.1 Centre Recognition

Both centre recognition and qualification approval must be gained before centres are permitted to deliver these qualifications. Guidance on the centre recognition and qualification approval processes is available on the website:

https://www.gatewayqualifications.org.uk/advice-guidance/help-admin-tasks/centre-recognition/

5.2 Qualification-specific centre requirements

There are no additional internal/external quality assurance requirements for this/these qualification.

Learning in the Work Place

Where delivery of a unit is in the work place, centres are required to exercise due diligence in respect of the following:

- Risk assessments
- Health and safety requirements

Provision of appropriate learning experience

5.3 Qualification-specific tutor/assessor requirements

Tutors/Assessors must be fully qualified and experienced in the sector in which they are delivering, details of which must be provided to Gateway Qualifications as part of the Qualification Approval application.

6. Quality Assurance

6.1 Qualification-specific quality assurance requirements

There are no additional internal/external quality assurance requirements for this qualification.

6.2 Malpractice

Malpractice is any deliberate activity, neglect, default or other practice that compromises the integrity of the internal and external assessment process, and/or the validity of certificates. It covers any deliberate actions, neglect, default or other practice that compromises, or could compromise:

- the assessment process
- the integrity of a regulated qualification
- the validity of a result or certificate
- · the reputation and credibility of Gateway Qualifications
- the qualification to the public at large.



Centre staff should be familiar with the contents of Gateway Qualifications Malpractice and Maladministration Policy, https://www.gatewayqualifications.org.uk/wp-content/uploads/2017/10/Malpractice-and-Maladministration-Policy.pdf

6.3 Additional requirements/guidance

There are no additional requirements that learners must satisfy in order for assessment to be undertaken and the unit/qualification to be awarded.



7. What to do next

For existing centres please contact your named Development Manager or Development Officer.

Tel: 01206 911211

Email: enquiries@gatewayqualifications.org.uk

8. Gateway Qualifications

Gateway Qualifications, a not for profit registered charity, is an Awarding Organisation based in Colchester, Essex.

We work with learning providers and industry experts to design and develop qualifications that benefit the learner and the employer.

We support flexible, responsive and quality assured learning opportunities whether it's in the classroom, at work, in the community or through distance learning.

We are recognised by Ofqual, to design, develop and submit qualifications to the Regulated Qualifications Framework (RQF).



Appendix 1 – Unit Specifications

Unit Title: Develop and Implement Operational Plans for Procurement

Unit Reference Number: L/506/5288

GLH: 25
Level: 5
Credit Value: 6

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to develop and implement operational procurement plans.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

Please refer to the Gateway Qualifications assessment definitions document for guidance on assessment activities and the expectations for assessment practice and evidence for verification.



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand how to develop operational plans for procurement.	1.1. Explain the steps in the planning cycle. 1.2. Explain the tools and techniques that assist the development of operational plans in procurement.	 Steps in planning cycle: Steps in planning cycle to include, objective setting, option appraisal and choice, identifying actions and allocating resources, monitoring progress and reviewing results 1.2 Tools and techniques to assist planning: Forecasting techniques Market analysis techniques SWOT analysis Risk analysis Scenario analysis Budgeting Critical path analysis Gantt charts Procurement portfolio analysis (Kraljic) Pareto and ABC analysis SMART objectives



Be able to determine operational objectives in procurement.	 2.1. Determine operational objectives in procurement. 2.2. Evaluate potential opportunities related to objectives. 2.3. Prioritise objectives. 	 2.1. Determine operational objectives in procurement: Cost reduction objectives Risk reduction objectives Performance improvement objectives HR objectives Procurement infrastructure objectives Procurement process objectives 2.2. Potential opportunities: Sourcing opportunities Relationship opportunities from arms length to partnering Relationship management opportunities Organisational design opportunities Recruitment and development opportunities Value chain opportunities 2.3. Prioritise objectives: Evaluation of objectives based upon organisational impact List of objectives in ranked order
Be able to develop an operational plan in procurement.	3.1. Determine actions to achieve objectives.3.2. Produce a procurement operational plan.	 3.1 Actions to achieve objectives: Hierarchy of objectives Sequencing of actions to achieve objectives



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
	3.3. Agree operational plan including timescales and success criteria with stakeholders.	 3.2 Procurement plan: Draft procurement operational plan Milestones and key performance indicators 3.3 Agree plan with stakeholders: Presentation of plan to stakeholders Stakeholder dialogue Final operational procurement plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to implement and monitor operational plan in procurement.	 4.1. Implement plan against agreed timescales. 4.2. Monitor implementation of operational plan against success criteria in accordance with agreed timeframes. 4.3. Communicate progress of implementation to stakeholders. 	 4.1 Implement plan: Team briefing notes Procurement activities against plan Supplier review meetings Negotiation results Performance improvement 4.2 Monitor progress: Performance data Evaluation of progress v targets Progress reports 4.3 Communicate to stakeholders: Presentation of progress report to stakeholders



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able to review operational plan in procurement.	5.1. Review operational plan with stakeholders identifying areas of the plan requiring modifications.5.2. Produce revised plans and agree with stakeholders.	 5.1 Review plan with stakeholders: Stakeholder dialogue Agreed revision to the plan 5.2 Revised plan: Revised operational plan for procurement Communication of plan to stakeholders



Unit Title: Work Productively with Colleagues and Stakeholders

Unit Reference Number: J/506/5287

Level: 5

Credit Value: 6

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Storage

Unit Summary

This unit will help learners to maintain, monitor, review and improve working relationships with colleagues and stakeholders.

This unit has 6 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

Please refer to the Gateway Qualifications assessment definitions document for guidance on assessment activities and the expectations for assessment practice and evidence for verification.



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to provide colleagues and stakeholders with information.	 1.1. Determine information to be communicated to selected colleagues and stakeholders. 1.2. Adapt and present appropriate information in ways that promote understanding to colleagues or stakeholders. 	 1.1 Identify information: Market analysis information Sourcing information Negotiation information Contract formation information Supplier relationship information Internal customer relationship information Supplier performance 1.2 Present information: Trend analysis Market risk and opportunity reports Bid analysis with recommendations Supplier benchmarking Vendor rating Supplier balanced scorecards Supplier dashboard Key performance indicators



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to consult with colleagues and stakeholders in relation to decisions or activities.	2.1. Communicate with colleagues and stakeholders regarding any decisions or activities.	 2.1. Consult with colleagues: Consultation documents Approval requests Stakeholder meeting notes Stakeholder and colleague communication Project plans Project team meeting notes
Understand the importance of fulfilling agreements and honouring commitments made to colleagues and stakeholders.	 3.1. Examine the benefits of ensuring agreements made with colleagues and stakeholders are fulfilled. 3.2. Examine the negative impact on individuals and organisations of not fulfilling agreements made with colleagues and stakeholders. 	 3.1 Benefits from fulfilling agreements: Maintaining credibility Meeting service levels Achieving objectives Positive feedback from stakeholders Building and developing trust 3.2 Negative impact of not fulfilling agreements: Lack of support Alienation and conflict Poor performance



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand how to manage potential conflicts of interest.	4.1. Explain how to identify and manage potential conflicts of interest.	 4.1 Identifying and managing conflicts: Nature of conflict Causes of conflict Intra and inter group conflict Outcomes of conflict positive and negative Conflict styles Win / win approach to conflict resolution



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
5. Understand how to monitor working relationships.	 5.1. Explain the importance of monitoring changes in the working environment in relation to colleagues and stakeholders. 5.2. Explain how to monitor change in the working environment. 	 5.1 Importance of monitoring working environment changes: Impact of cultural changes Impact of personal changes Impact of infrastructure changes Impact of process changes Impact of workload changes 5.2 How to monitor working environment changes: Regular stakeholder mapping Cultural web mapping Balanced scorecard results Value chain mapping Customer feedback Organisational and departmental objectives



6. Be able to review and improve the effectiveness of working relationships.	 6.1. Analyse feedback on working relationships from colleagues and stakeholders. 6.2. Evaluate working relationships with colleagues and stakeholders in terms of continued effectiveness. 6.3. Determine and implement improvements to working relationships. 	 6.1. Working relationship feedback: External customer questionnaire / surveys Service level analysis 360 degree appraisals SMART objectives measurement Informal colleague and stakeholder feedback
		 6.2. Evaluate effectiveness of working relationships: Dashboards Balanced scorecards Gap analysis Service level achieved against target
		 6.3. Identify and implement improvements: Earlier purchasing involvement Clearer targets Negotiated service level agreements Regular review meetings Stakeholder and colleague empowerment and delegation Stakeholder and colleague motivation Improved reporting measures and frequency



Unit Reference Number: L/506/5274

Level: 5
Credit Value: 6
GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 15.3 Business Management

Unit Summary

Unit Title:

This unit will help learners to understand the theory of change management and how to plan change within own area to include risk assessment, optional appraisal and overcoming potential barriers to change.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

Please refer to the Gateway Qualifications assessment definitions document for guidance on assessment activities and the expectations for assessment practice and evidence for verification.



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand how to plan change.	1.1. Analyse, compare and evaluate tools and techniques for planning change.	 1.1 Plan change: Kotters 7 steps in change management Why change fails Role of the change agent Stakeholder management
Be able to develop plans for change in own area of responsibility.	 2.1. Identify and explain the change required. 2.2. Develop a plan to effect the required change. 2.3. Assess development requirements needed to ensure the success of the planned change. 2.4. Evaluate the risks and benefits associated with the plan. 2.5. Consider contingency arrangements based on identified risks. 	 2.1 Explain change: Gap analysis Rationale for change Presentations Stakeholder communication 2.2 Develop plan: Change management plan 2.3 Development requirements: Stakeholder buy-in Financial resources People resources Competence and skill matrix Project management requirements



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 2.4 Risks and benefits: Stakeholder mapping Risk matrix Opportunity/benefits matrix 2.5 Contingency plan: "what if" scenarios Contingency plans
Be able to develop systems for monitoring and assessing progress.	3.1. Determine appropriate systems to monitor and assess the progress of change.	 3.1 Monitoring the progress of change: Milestones Key performance indicators Performance gathering methodology Performance analysis Presentation of results



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able to evaluate barriers and determine ways to overcome resistance to planned change.	4.1. Evaluate barriers that may hinder the planned change.4.2. Determine ways to overcome resistance to planned change.	 4.1 Identifying barriers to change: Potential barriers to change Stakeholder mapping Force field analysis 4.2 Overcoming barriers: Early stakeholder involvement Stakeholder management Publishing early wins



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to develop a communication strategy to facilitate the process for change.	 5.1. Evaluate a range of communication methods to support the process of change. 5.2. Develop a communication strategy to facilitate the process for change and review with feedback to continue the process for change. 	 5.1 Communication methods evaluation: Who wants to know? What are we trying to prove? Reporting requirements and communication methods Stakeholder mapping and reporting requirements 5.2 Communication strategy: Reporting content Reporting formats Reporting frequencies Stakeholder group communication strategy



Improve the Performance of the Supply Chain

Unit Reference Number: A/506/5285

Level: 5

Credit Value: 6

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit will help learners to understand the analysis techniques to determine supply chain performance gaps, how to plan and introduce improvements to improve the performance of the supply chain.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

Please refer to the Gateway Qualifications assessment definitions document for guidance on assessment activities and the expectations for assessment practice and evidence for verification.



Improve the Performance of the Supply Chain

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand how an effective supply chain supports organisational strategy.	1.1. Explain the components of an effective supply chain.1.2. Explain how an effective supply chain strategy can support organisational strategies.	 1.1 Improve the Performance of the supply chain: Upstream and downstream relationship management Creation of value through the value chain Network of organisations and network sourcing Two way flows of information and goods Open communication, sharing information and collaboration between members Inter organisational collaboration



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 1.2 How supply chain strategy supports organisational strategy: Supply chain cost reduction strategies to support generic cost leadership strategies Supply chain continuous improvement strategies to support generic differentiation strategies including supplier innovation, lead time reductions and improved quality Supply chain strategies to support merges and acquisitions Supply chain strategies to support new products and new markets
Be able to evaluate the performance of the supply chain.	2.1. Evaluate the performance of the supply chain.2.2. Present findings of the evaluation to stakeholders in the appropriate formats.	 2.1 Evaluate performance: Supply chain process evaluation Supply chain value chain evaluation Supply chain infrastructure evaluation including systems and information flow Supplier performance evaluation Performance gap analysis



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 2.2 Present findings to stakeholders: Supply chain performance reports Supply chain performance presentations Supply chain benchmarking results Supply chain dashboard Supply chain balanced scorecard Stakeholder communication
Be able to develop a plan for improving the performance of the supply chain.	 3.1. Use evaluation to prioritise areas for improving the performance of the supply chain. 3.2. Develop an improvement plan with success criteria and timescales. 3.3. Agree plan with stakeholders. 	 3.1 Evaluation to prioritise improvement areas: Supply chain performance gap analysis Areas for performance improvement Ranked areas of performance improvement based upon supply chain cost reduction, risk reduction, continuous improvement and innovation factors 3.2 Develop an improvement plan: Supply chain performance improvement plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 3.3 Agree plan with stakeholders: Presentation of plan to stakeholders Stakeholder communication Final supply chain performance improvement plan
Be able to implement and monitor plan for improving the performance of the supply chain.	 4.1. Implement plan to improve the performance of the supply chain. 4.2. Monitor implementation of plan against success criteria and amend plan as required. 	 4.1 Implementation plan: Briefing of improvement teams Planning meeting Reports of quick wins 4.2 Monitor implementation: Performance measurement date Gap analysis of actual performance v target Revised implementation plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to review the improvements to the performance of the supply chain.	5.1. Measure the improvements to the performance of the supply chain.5.2. Communicate outcomes to stakeholders.	 5.1 Measure improvements: Supply chain performance improvement measures Performance improvement analysis and evaluation Supply chain performance improvement summaries 5.2 Communicate outcome to stakeholders: Supply chain performance improvements presentations Stakeholder communication Supply chain performance dashboards Supply chain performance balanced scorecards



Unit Title: Manage Risk in Procurement

Unit Reference Number: F/506/5286

Level: 5

Credit Value: 6

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to understand the key risks that impact on procurement, how to identify and analyse their impact then how to manage and mitigate them.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand risk management in procurement.	 1.1. Evaluate the key risks that impact on procurement. 1.2. Explain the tools and techniques that can be used to manage risk in procurement. 	 1.1 Key risks that impact on procurement: Macro and micro supply market risks Supplier failure to meet obligations Financial risks including exchange rates and price increases Supply chain and logistics risks impacting on security of supply Bribery, corruption and fraud risks Inventory stock outs 1.2 Tools and techniques to manage risks: Macro and micro supply market risk probability and impact analysis Procurement expenditure and risk analysis (Kraljic) Supplier appraisal Sourcing options to mitigate risk Terms and conditions of contract including model forms of contract including model forms of contract INCO terms The role of insurance in risk management



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
		 Risk registers, risk mitigation strategies and contingency planning Project management tools and techniques Statistical methods to mitigate risk in inventory management CSP and ethical policies Supplier relationship management (SRM)



Be able to undertake a procurement risk assessment.	 2.1. Analyse the procurement portfolio to identify areas of potential risks. 2.2. Undertake a risk/impact analysis. 2.3. Evaluate options for risk reduction. 2.4. Prioritise categories of procurements requiring risk reduction strategies with stakeholders. 	 2.1 Identify areas of risk: Supply market risk analysis Supply chain risk analysis Identifying poor performing suppliers through vendor rating Areas of buyer vulnerability (Courts supplier orientation model) Areas of legal framework vulnerability
		 2.2 Undertake risk / impact analysis: Procurement targeting model (Kraljic matrix) Risk impact analysis matrix "what if" scenarios 2.3 Options for risk reduction: Finding new sources of supply Re-sourcing Dual or multiple sourcing Creating closer supplier relationships through procurement marketing and supplier relationship management Re-negotiating contracts Improved CSR and ethical code of conduct
		 Improved supplier performance measurement



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 2.4 Prioritisation of risk reduction categories: Ranked areas of risk reduction categories of expenditure based upon risk probability and potential impact Procurement targeting model showing critical and bottleneck suppliers requiring risk reduction strategies Presentation of findings to stakeholders
3. Be able to produce risk reduction plans.	3.1. Consult with stakeholders and agree preferred options for risk reduction.3.2. Produce risk reduction action plan including contingency plans.	 3.1 Consult with stakeholders: Option appraisal for risk reduction Presentation of options to stakeholders Agreed options for risk reduction 3.2 Risk reduction plan: Sequencing activities Gantt charts Critical path analysis Project plan with key milestones and contingency plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to implement risk reduction plans.	4.1. Implement risk reduction plans.4.2. Review progress against targets with stakeholders implementing contingency plans where appropriate.	 4.1 Implement plans: Organising and assigning work packages Establishing performance review mechanisms Stakeholder communication 4.2 Review progress: Performance review against targets Implementing remedial actions and contingency plans Change control notices Stakeholder review meetings



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to manage outcomes of risk reduction plans.	5.1. Present findings and recommendations from risk reduction activities to stakeholders.5.2. Agree actions to further mitigate risks.	 5.1 Present findings from outcomes: Results of risk reduction activities Summary of activities and benefits achieved Risk reduction outcome reports and presentations Stakeholder communication and dialogue 5.2 Further actions: Stakeholder review and analysis communication Revised procurement risk reduction strategies and plans



Unit Reference Number: T/506/5284

Level: 5

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit helps learners to understand the concept of category management and produce a category management strategy.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

Please refer to the Gateway Qualifications assessment definitions document for guidance on assessment activities and the expectations for assessment practice and evidence for verification.



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand the benefits of category management.	1.1. Explain the differences between category management and conventional sourcing.1.2. Explain the benefits for an organisation of adopting category management.	 1.1 Category management v conventional sourcing: Definition of category management Stages in conventional sourcing Stages in category management 1.2 Benefits of category management: Cross functional teams with a common objective Early procurement involvement End to end procurement process management Strategic approach v tactical procurement Combination of strategic sourcing and supplier relationship management coordinated through highly competent procurement category managers



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to determine areas for category management.	2.1. Conduct a strategic review of areas in procurement suitable for category management.2.2. Agree areas for category management.	 2.1 Review procurement areas for category management: Pareto analysis Procurement portfolio analysis (Kraljic) Review of direct, indirect and capital expenditure Review of service expenditures Sourcing tree 2.2 Agree areas for category management: Category list based upon internal factors, market factors, supplier factors, procurement factors and category specific factors



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to develop a category management strategy.	3.1. Develop a category management strategy. 3.2. Determine reporting mechanism for strategy implementation.	 3.1 Develop a category strategy: Review of existing procurement arrangements Review of stakeholder needs Assessment of supply market factors and their potential risk / impact Sourcing option appraisal Review of contract duration and type of supplier relationship required Review of key performance measures Category management strategy document 3.2 Strategy implementation reporting: Stakeholder mapping Determining who wants to know and what do they want to know Key performance indicators, frequency of reporting and method of reporting



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to communicate a category management strategy.	4.1. Communicate a category management strategy to stakeholders.4.2. Revise category management strategy in response to feedback.	 4.1. Communicate strategy to stakeholders: Category strategy Strategy presentation to stakeholders Stakeholder feedback Stakeholder dialogue 4.2. Revise strategy: Revisions to strategy document New category strategy Circulation of final category strategy to stakeholders



Unit Reference Number: M/506/5283

Level: 5

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit helps learners to understand the category management procurement process and be able to implement a category procurement.

This unit has 6 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand the skills required to manage a procurement for a category of expenditure.	1.1. Explain the technical skills required for category management.1.2. Explain the behavioural skills required for category management.	 1.1 Category management technical skills: Project management skills Upstream procurement skills Downstream procurement skills Legal understanding and knowledge Purchase price and cost analysis skills Risk management skills Complex problem solving skills 1.2 Category management behavioural skills: Relationship awareness competencies Customer focus skills Negotiation skills Ethical behavioural skills



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand the differences between category management and conventional sourcing.	2.1. Analyse the differences between category management and conventional sourcing.	 2.1 Differences between category management and conventional sourcing: Supply market analysis differences Sourcing strategy differences Stakeholder involvement differences Bid management differences Procurement process management differences Performance measurement differences



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to establish a category sourcing plan.	 3.1. Review strategy for category of expenditure. 3.2. Evaluate routes to market for category of expenditure. 3.3. Determine preferred route to market and produce sourcing plan. 	 3.1 Review strategy: Existing category strategy Amended category strategy 3.2 Evaluate routes to market: Direct negotiation Quotations and negotiation Open tendering Restricted tendering Tendering and negotiation 3.3 Sourcing plan: Type of agreement and duration Sourcing method Sourcing timescales Sourcing / evaluation team roles Supplier bid evaluation criteria and sourcing methodology Overall project plan



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able to agree the category sourcing plan with stakeholders.	4.1. Agree category sourcing plan with appropriate stakeholders.	 4.1. Agree plan with stakeholders: Presentation of sourcing plan to stakeholders Stakeholder dialogue Revised sourcing plan



5.	Be able to implement the category sourcing plan.	 5.1. Establish cross functional team to agree evaluation criteria and carry out evaluation for bids. 5.2. Solicit bids from suppliers. 5.3. Evaluate bids against agreed criteria. 5.4. Conduct negotiations with preferred suppliers. 	 Establish evaluation team: Evaluation team members and roles Supplier bid evaluation criteria and scoring methodology Supplier bid evaluation team briefing 5.2 Solicit bids: Quotations Invitation to tender Negotiation meetings E-auctions and e-tenders 5.3 Evaluate bids: Bid evaluation spreadsheets Bid evaluation summary Rejected and non-compliant bids Shortlisted bidders 5.4 Negotiation planning document Negotiation planning documents Negotiation team briefing Post tender negotiation meetings Post bid negotiation meetings Bid clarification meetings Revised bids
6.	Be able to establish contractual relationships with category supplier(s).	6.1. Select supplier and ratify decision with stakeholders.6.2. Award contract to successful supplier(s).	 6.1. Select supplier: Agreement award recommendation paper Consultation with category management cross-functional team



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
		Agreement award ratification with category team and stakeholders 6.2. Award contract: Contract documentation including relationship review measures "kick off" meeting with supplier Circulation of agreement to stakeholders



Unit Reference Number: K/506/5282

Level: 5

Credit Value: 5

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit helps learners to understand and implement supplier relationship management.

This unit has 7 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand supplier relationship management.	 1.1. Explain the supplier relationship continuum and its application to supplier relationship management. 1.2. Evaluate the key factors required for effective supplier relationship management. 	 1.1 Supplier relationship continuum and supplier relationship management (SRM): Supplier relationship continuum from competitive to collaboration Requirements of relationship management for each stage of the relationship continuum from minimal to close relationship management 1.2 Factors for effective relationship management: Choosing the right supplier Agreed service level review mechanisms Shared goals building rapport and trust Information sharing Regular reviews Joint continuum improvement projects



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to develop a supplier relationship management plan.	 2.1. Analyse roles and responsibilities of stakeholders involved in the supplier relationship management process. 2.2. Establish supplier relationship plan including key performance measures. 2.3. Agree supplier relationship plan and timescales for review with stakeholders. 	 2.1 Roles and responsibilities of stakeholders: Stakeholder mapping Stakeholder role statements 2.2 Supplier relationship plan: Quantitative relationship factors Qualitative relationship factors Continuous improvement targets Output key performance indicators Process key performance indicators Behavioural key performance indicators Relationship plan with review periods 2.3 Agree plan with stakeholders: Presentation of relationship plan to stakeholders Stakeholder dialogue Final supplier relationship plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to measure supplier relationship performance.	 3.1. Analyse data on supplier relationship performance. 3.2. Benchmark data against supplier relationship performance measures. 	 3.1 Analyse data on relationship performance: Performance data regarding cost, delivery and support, flexibility and quality Improvement data including continuous improvement and innovation Relationship data including information sharing, developing trust and ability to work together 3.2 Benchmark data: Analyse and evaluation of collected data against key performance indicators Gap analysis



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to produce report of supplier relationship performance.	 4.1. Produce report of supplier relationship performance. 4.2. Communicate report of supplier relationship performance to different stakeholder groups. 	 4.1. Report of supplier relationship performance: Dashboards Balanced scorecards Charts and graphs Statistical measures Supplier performance reports 4.2. Communicate report to stakeholder groups: Presentation of performance reports to stakeholders Dialogue with different stakeholder groups



LI	EARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
T	he learner will:	The learner can:	
5.	Be able to conduct supplier review meetings.	5.1. Conduct supplier review meetings.5.2. Agree areas for improvement with stakeholders.	 5.1 Conduct supplier review meetings: Supplier review meeting agendas Supplier review meeting notes / minutes 5.2 Areas for improvement: Supplier review meeting actions Stakeholder dialogue Areas for supplier relationship performance improvement
6.	Be able to produce continuous improvement plans for supplier relationship performance.	6.1. Produce continuous improvement plans for supplier relationship performance.6.2. Agree continuous improvement plans with stakeholders.	 6.1. Produce supplier continuous improvement plan: Plan identifying areas for improvement, timescales and key measures 6.2. Agree plans with stakeholders: Presentation of improvement plan to stakeholders Stakeholder dialogue Final supplier relationship performance improvement plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
7. Be able to implement continuous improvement plans for supplier relationship performance.	 7.1. Implement continuous improvement plans. 7.2. Monitor performance improvement. 7.3. Communicate improvements to supplier relationship performance to stakeholders. 7.4. Respond to feedback from stakeholders. 	 7.1. Implement improvement plan: Supplier improvement plan initial meetings Supplier review meetings 7.2. Monitor improvements: Measure supplier relationship improvements Analyse and evaluate improvements against targets Summarise findings in appropriate format such as dashboards, balanced scorecards and reports 7.3. Communicate improvements to stakeholders: Presentation of improvements to stakeholders Stakeholder dialogue 7.4. Respond to feedback: Review meetings Revised improvement plans



Unit Reference Number: H/506/5281

Level: 5

Credit Value: 5

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit will help learners to manage the flow of supplies through the supply chain to meet the needs of stakeholders.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand the tools and techniques for managing the flow of supplies in the supply chain.	 1.1. Evaluate the different measurement tools used to manage the flow of supplies in the supply chain. 1.2. Explain the relationship techniques used to manage the flow of supplies in the supply chain. 	 1.1 Management tools: ERP systems (enterprise resource planning) MRP systems (material requirement planning) Pull v push systems of flow management Just in time and Kanban systems Lean and agile systems of flow management Service level agreements Vendor rating 1.2 Relationship techniques for flow management: Quality circles Persuasion techniques Expediting relationship building Leading and influencing techniques and the use of power Supplier relationship management



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
2. Be able to agree a delivery schedule.	 2.1. Consult with internal stakeholders and agree delivery schedule. 2.2. Consult with suppliers to determine the feasibility of meeting the delivery schedule. 2.3. Agree the delivery schedule with supplier. 	 2.1 Agree schedules with stakeholders: Stakeholder dialogue Production plans and bill of materials (BOM) Forecasts Draft schedule 2.2 Supplier consultation: Supplier dialogue Enquiries and questions Supplier meetings Draft schedule 2.3 Agree schedule with supplier: Purchase orders Delivery schedules



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
3. Be able to manage any potential changes to the schedule.	 3.1. Consult with internal stakeholders and agree any changes to the schedule. 3.2. Consult with suppliers to determine the feasibility of meeting the revised delivery schedule. 3.3. Negotiate changes to the schedule with stakeholders. 3.4. Ensure changes conform to organisational requirements. 3.5. Communicate changes to all stakeholders and update schedules. 	3.1 Agree schedule change with stakeholders: Increased demand documentation Decreased demand documentation Stakeholder dialogue Stakeholder meetings 3.2 Consult with suppliers: Supplier dialogue Supplier meetings 3.3 Negotiate changes: Stakeholder dialogue Stakeholder meetings Revised draft delivery schedule 3.4 Ensure changes conform to organisational requirements: Comparison of draft schedule with organisation requirements Stakeholder dialogue



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
		 3.5 Communicate changes: Stakeholder communication Purchase order amendments Contract change notices / variations to contract New delivery schedule



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to ensure the flow of supplies complies with the delivery schedule.	 4.1. Monitor flow of supplies against schedule. 4.2. Identify and analyse areas of non-compliance. 4.3. Resolve areas of non-compliance with stakeholders. 	 4.1. Monitor flow against schedule: Vendor rating Pro-active expediting 4.2. Analyse areas of non-compliance: Delivery performance reports Gap analysis showing areas of non-compliance 4.3. Resolve non-compliance: Stakeholder dialogue Negotiation meetings Contract damages Revised delivery schedule Stakeholder communication



Manage the Flow of Supplies in the Supply Chain

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to evaluate the performance of the flow of supplies in the supply chain.	5.1. Evaluate performance data on the flow of supplies.5.2. Produce findings with recommendations and communicate to stakeholders.	 5.1 Evaluate performance data: Vendor rating Service level achievements Areas of non-compliance Cause and effect of non-compliance 5.2 Produce findings: Gap analysis Service level achievement v target Vendor rating charts and graphs Delivery performance reports



Unit Reference Number: D/506/5280

Level: 5

Credit Value: 6

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit will help learners to implement project management tools when managing a project within a cross functional project team.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand the principles of project management.	1.1. Explain the principles of project management.1.2. Explain the key tools and techniques used in project management.	 1.1 Principles of project management: Quality, cost and time triangle Quality, cost and trade-offs Cross functional teamwork Lifecycle planning Project risk mitigation Project milestones and measurement 1.2 Key tools and techniques in progress management: Project definition tools and techniques Project planning tools and techniques Project organising tools and techniques Project controlling tools and techniques Project closure tools and techniques



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to determine the requirements and objectives of projects in procurement.	2.1. Consult with stakeholders to determine requirements of projects in procurement.2.2. Agree objectives and time frames of projects with stakeholders.	 2.1 Determine requirements with stakeholders: Stakeholder dialogue Operational requirement 2.2 Agree objectives and timescales: Stakeholder dialogue Project terms of reference Overall project timescale and key milestones
3. Be able to produce a project plan.	 3.1. Undertake a project risk analysis. 3.2. Determine resources required to complete the project. 3.3. Agree project team members with stakeholders. 3.4. Produce a detailed project plan. 	 3.1 Undertake risk analysis: Risk / impact analysis Force-field analysis Risk register Risk mitigation plan 3.2 Determine project resources: Financial resources System and infrastructure resources Project process management resources including human resources



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 3.3 Agree project team members with stakeholders: Stakeholder dialogue regarding internal team members Stakeholder dialogue regarding external consultant team members Project team list Project team members role and responsibilities statements 3.4 Detailed project plan: Sequencing activities Gantt chart Critical path analysis Contingency plans and risk mitigation plans Project plan with timings and costings



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
4. Be able to manage a project.	 4.1. Allocate project tasks to team members. 4.2. Support project team in achieving project milestones. 4.3. Monitor project progress against milestones. 4.4. Monitor project risk. 4.5. Provide project progress reports to stakeholders. 4.6. Implement contingency plans as required. 	 4.1. Allocate tasks: Project team role statements Project start-up meetings Project team dialogue 4.2. Support project team: Project review meetings Project team dialogue 4.3. Monitor project progress: Progress against timescales Progress against deliveries Project progress reports 4.4. Monitor project risk: Occurrences of identified risks and their impact Occurrences of unidentified risks and their impact Effectiveness of risk mitigation plans Revised risk mitigation plans



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
		 4.5. Project progress reports: Presentations of project progress reports to stakeholders Stakeholder dialogue regarding project progress 4.6. Implement contingency plans: Area of failure of original plan Team briefing on contingency plans Review of progress for contingency plan



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to evaluate outcomes of a project.	5.1. Evaluate outcomes of project.5.2. Communicate outcomes of project to stakeholders.	 5.1 Evaluate outcome of project: Measurement of final outcomes v targets in terms of cost, quality and timescales Deliverable benefits of project Lesson learnt from project Overall project outcome summary 5.2 Communicate outcomes to stakeholders: Project outcome report Presentation of report to stakeholders Stakeholder dialogue



Unit Title: Develop Sustainability in the Supply Chain

Unit Reference Number: K/506/5279

Level: 5

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to understand the concept of sustainability in the supply chain and implement a supply chain sustainability programme.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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Develop Sustainability in the Supply Chain

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand sustainability in the supply chain.	1.1. Explain the key initiatives and standards to improve supply chain sustainability.1.2. Explain how key areas of sustainability impact on supply chains.	 1.1 Initiatives and standards in supply chain: Labour standards and the International Labour Organisation (ILO) Labour codes of conduct Environmental standards such as ISO 14001 Fair trade organisations and fair trade standards Responsible procurement initiatives including ethical procurement Health and safety standards 1.2 Impact on supply chains: Impact on supply chain markets Impact on suppliers Impact on the supply chain and logistics Impact on achieving lowest acquisition cost



2.	Be able to produce a supply chain sustainability plan.	 2.1. Review an organisation's corporate social responsibility plan. 2.2. Analyse key factors affecting supply chain sustainability. 2.3. Produce a supply chain sustainability plan in consultation with stakeholders. 	 2.1 Organisations corporate social responsibility: Organisations corporate social responsibility plan Identify factors affecting supply chain management 2.2 Analyse key factors affecting supply chain sustainability: Environmental factors Workforce factors Health and safety factors Ethical factors Fair trade factors 2.3 Produce a supply chain sustainability plan: Supply chain sustainability policy Dialogue with stakeholders Supply chain sustainability plan to include; sustainability in supply market analysis, sustainability in supply market analysis, sustainability in developing requirements, sustainability in sourcing and contracting, sustainability in supply relationship management and supplier development
3.	Be able to implement a supply chain sustainability plan.	3.1. Agree implementation plan with stakeholders.	3.1 Agree implementation plan:Stakeholder dialogue to agree implementation plan



Develop Sustainability in the Supply Chain

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
	3.2. Implement plan against key performance indicators.	 Sustainability implementation plan with key performance indicators 3.2 Implement supply chain sustainability plan: Revised procurement documentation to include sustainability factors Procurement team briefing meeting Supplier dialogue communicating plan Actions to demonstrate implementation plan Measurement of implementation progress



Develop Sustainability in the Supply Chain

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to review the performance of the supply chain sustainability plan.	 4.1. Monitor results against key performance indicators. 4.2. Summarise findings and present to stakeholders. 4.3. Revise plan in line with feedback from stakeholders. 	 4.1. Monitor results: Evaluation of implementation progress against key performance indicators Identification of areas not meeting targets and those exceeding targets 4.2. Present findings: Sustainability performance report Presentation of report to stakeholders Stakeholder dialogue to agree changes to plan 4.3. Revised plan: Revised supply chain sustainability plan Communication of revised plan to stakeholders



Unit Reference Number: H/506/5278

Level: 5

Credit Value: 5

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

Unit Title:

This unit will help learners to optimise space and layout when planning and implementing internal warehouse design.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand best practice relating to planning the storage of supplies in the supply chain.	1.1. Explain best practice relating to the storage of supplies.1.2. Explain the criteria for optimal stores layout.	 1.1 Best practice strategy: Space optimisation Palletisation and packaging Stock rotation Material handling optimisation Continuous stock checking Obsolescence and redundant stock policy 1.2 Optimal stores layout: Think cubed ABC analysis to position stock based on throughput Dealing with hazardous materials Secure locations for high value stock Optimisation of goods in, picking and packing and goods out resources



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to evaluate the requirements for storage of supplies in the supply chain.	2.1. Consult stakeholders on their requirements.2.2. Evaluate data on the goods requiring storage.	 2.1 Identify items to be stored: Stock request forms Stakeholder dialogue Production plans and bill of materials Stock v non stock procurement portfolio analysis 2.2 Evaluate data: Demand for items and frequency of picking Physical specification of items / pack sizes Maximum stock levels and storage volumes



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to plan the storage of supplies in the supply chain.	3.1. Assess stock locations and storage space. 3.2. Produce storage plan for supplies in consultation with stakeholders.	 3.1 Stock locations: Identification of available storage space Review of space available against storage requirements Draft stores layout plan taking into account space optimisation and stock throughput 3.2 Produce storage plan: Presentation of draft stores layout plan to stakeholders Stakeholder dialogue Final stores layout plan showing stock locations and storage solutions along with implementation timescale



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to manage the implementation of the storage plan.	4.1. Manage the implementation of the storage plan.4.2. Evaluate plan outcomes and recommend improvements to future storage plans.	 4.1 Implement plan: Purchase orders for equipment and services being outsourced Implementation team briefing Achievement of key milestones Implementation review meetings Dialogue with stakeholders 4.2 Outcomes and improvements: Achievements v targets in time, cost and quality Performance report identifying areas for improvement for the future Communication to key stakeholders



Unit Title: Manage Inventory

Unit Reference Number: J/506/5273

Level: 4

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to understand the theory of inventory management and be able to manage stock levels to meet organisational requirements in a cost effective manner.

This unit has 6 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand the principles of inventory management.	1.1. Explain why organisations hold stock.1.2. Explain the principles of effective inventory management.	 1.1 Why do organisations hold stock: Buffer between supply and demand Managing fluctuating supplier lead times Bulk purchase discounts Unit of purchase v unit of issue Management of bottleneck risk Hedging against inflation 1.2 Principles of inventory management Principles of achieving economic, ethical and effective inventory management Inventory management saw tooth diagram Components of an effective inventory management system Inventory management performance measures



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able determine supplies for stockholding.	2.1. Determine items to be held in stock in accordance with organisational policy. 2.2. Establish stockholding levels for items to be held in stock to enable customer demand to be met at least cost.	 2.1 Identify items to be held in stock: New stock requests Evaluation of stock v non-stock options Organisational policy on stockholding 2.2 Establish stockholding levels: Maximise and minimise stock levels Re-order levels and economic order quantities Calculation of safety stock levels



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
3. Be able to replenish stock levels.	 3.1. Run re-order level reports on a regular basis to ensure stock does not fall below minimum levels. 3.2. Determine stock items requiring replenishment and place orders. 3.3. Expedite outstanding stock orders. 	 3.1 Run ROL reports: Computerised re-order level reports Re-order level reports for continuous inventory management Manual re-order level reports for periodic inventory management 3.2 Stock requiring replenishment: Stock replenishment list Re-order quantity report Order stock items: Purchase orders Order confirmation



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
		 3.3 Expedite orders: Overdue order list prompting re-active expediting Supplier communication Revised delivery dates Outstanding order list prompting proactive expediting



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
4. Be able to monitor stock usage.	 4.1. Monitor stock including slow moving, obsolete and fast moving. 4.2. Report findings of stock monitoring to stakeholders and recommend items for stock re-adjustment. 	4.1 Determine slow moving stock:



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
5. Be able to change inventory levels.	 5.1. Interpret findings from consultation with stakeholders to identify where stock levels should be changed. 5.2. Implement changes to stock levels to meet customer demand at least cost. 5.3. Dispose of redundant stock in the most cost effective manner. 5.4. Re-set stock control parameters. 	 5.1 Consult with stakeholders: Stock analysis reports Stakeholder dialogue Agreement of usages to stock profile and stock levels 5.2 Implement changes: Changes to stock profile Stock records 5.3 Dispose of redundant stock: Advertising redundant stock Negotiating with suppliers to buy back redundant stock Write off of stock 5.4 Reset stock levels: Reset min/max levels on stock records Reset re-order levels and re-order quantities Revised stock records



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to measure the performance of inventory management.	 6.1. Produce inventory management reports which identify economic, efficiency and effectiveness of the inventory management system. 6.2. Review reports with stakeholders and recommend ways to improve inventory management performance. 	 6.1. Inventory management reports: Stock turn reports Service level reports Stock value reports Customer feedback reports 6.2. Review with stakeholders: Stakeholder presentations Stakeholder dialogue Revised inventory management targets



Unit Title: Operations Management Processes

Unit Reference Number: D/506/5277

Level: 5

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to understand operations management and be able to improve operations management within their organisation.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand the role of operations and operations management within business.	 1.1. Explain the roles and responsibilities of operations managers within different organisational contexts. 1.2. Explain the operational aspects of own role. 1.3. Analyse how operations management supports business. 	 1.1 Roles and responsibilities of ops management: Definition of operational management Operations management in different types of organisations including services, manufacturing, construction, retail and the public sector 1.2 Explain operational aspects of own role: Managing procurements Managing contracts Managing supplier relationships Managing the supply chain 1.3 How operations management supports business: Supporting corporate strategies Hierarchy of objectives and operations management role Meeting organisations annual targets



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand the design of operations processes.	2.1. Analyse the objectives and design of operation processes.2.2. Analyse the interconnected relationship between operations processes and supply networks.	 2.1 Objectives and design: Objectives of quality, speed, defend ability, flexibility and cost Stages of development of operations process 2.2 Relationship between operation and supply networks: Configuring the supply network Contrast operations management and supply network management Tools and techniques including value engineering and value analysis



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Understand the correlation between operations management and strategic planning.	3.1. Explain the links between strategy and operational performance targets.3.2. Analyse why there may be tension between different performance targets.	 3.1 Links between strategy and operational targets: Hierarchy of objectives Top down, bottom up objectives 3.2 Where tensions can develop: Quick wins v long term goals Improved targets v improved processes Reliance on existing culture v culture change requirements



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	-
Be able to introduce improvements to the value chain that could enhance competitive advantage in business.	4.1. Analyse the use of the value chain as a platform for identifying competitive advantage.4.2. Introduce improvements to the value chain.	 4.1 Value chain analysis: Value chain components Value chain analysis process Value chain and competitive advantage 4.2 Improving the value chain: Value chain analysis and supply chain improvement Supply chain improvement plan Stakeholder dialogue and improvement plan agreements Introduction of value chain improvements



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to manage the key challenges to improve operational management performance. Be able to manage the key challenges to improve operational management performance. The second se	 5.1. Analyse the key challenges for own organisation and the role of operations management in dealing with these. 5.2. Produce plan to manage key challenges. 5.3. Implement plan to manage key challenges. 	 Key challenges: Key challenges / performance improvement requirements for sourcing, contracting and supplier relationships Role of operations management in meeting key challenges 5.2 Produce plan: Draft operational supply chain plan to improve performance Stakeholder dialogue Final operational supply chain improvement plan with key targets 5.3 Implement plan: Team briefings Stakeholder dialogue Procurement activities Performance measurement Performance review and amended plans



Unit Title: Evaluate Supplier Performance

Unit Reference Number: D/506/5263

Level: 4

Credit Value: 5

GLH: 25

Unit Grading Structure: Pass

Sector Subject Area: 15.3 Business Management

Unit Summary

This unit will ensure that learners are able to measure and evaluate the on-going performance of suppliers

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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Evaluate Supplier Performance

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand how supplier performance should be evaluated.	1.1. Explain best practice in supplier evaluation. 1.2. Explain the key performance measures that should be used when conducting supplier evaluation. valuation.	 1.1 Best practice: Evaluation of suppliers performance/outcomes Evaluation of supplier processes Evaluation of supplier value chain Evaluation of relationship Evaluation of suppliers continuous improvement and innovation Use of balanced scorecards 1.2 Key performance measures: Quality compliance Lead time achievement Meeting demand first time Maintenance Customer service level Supplier innovation Cost reduction Relationship management Responsiveness Process improvements



Evaluate Supplier Performance

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to gather information to evaluate supplier performance.	2.1. Gather suitable sources of information to evaluate supplier performance.	 2.1 Gather information: Performance data Internal customer feedback Supplier accounts Supplier improvement plans Cost reduction plans
Be able to evaluate information on supplier performance.	3.1. Use appropriate analytical techniques to evaluate relevant information. 3.2. Produce key findings relating to supplier performance in appropriate formats for different stakeholders.	 3.1 Analytical techniques: Trend analysis Measures of dispersion Weighting and ranking of evaluation criteria Market comparisons 3.2 Produce key findings: Reports Dashboards Balanced scorecards Graphs and charts presentations



Evaluate Supplier Performance

LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to discuss results of supplier performance evaluation with stakeholders.	4.1. Discuss key finding relating to supplier performance with stakeholders.4.2. Agree areas for development with stakeholders.	 4.1 Discuss findings with stakeholders: Reports of supplier performance Presentations to stakeholders Stakeholder meetings Stakeholder communication 4.2 Areas for development: Supplier improvement plans Performance improvements Relationship improvements CSR and ethical improvements Supply chain process improvements



Unit Reference Number: R/506/5275

Level: 5

Credit Value: 4

GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 15.3 Business Management

Unit Summary

Unit Title:

This unit aims to provide the learner with the ability to recognise own strengths within own area of responsibility and to use these to provide leadership to the team in achieving required goals. The learner will also gather appropriate feedback from team members which, together with own reflection on leadership of the team, will lead to enhancement in the performance of the team and the individual.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to assess own capacity to lead in own area of responsibility.	1.1. Assess own strengths and ability to lead in a leadership role.1.2. Evaluate strengths within own area of responsibility.	 1.1 Assess own strengths: Distinguish leadership from management Leadership traits and styles Leadership self-analysis questionnaires 1.2 Evaluate strengths: Evaluation of leadership in four directions Strengths and weakness evaluation Job role mapped to leadership competencies



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able to provide direction and set objectives in own area of responsibility.	2.1. Outline direction for own area of responsibility.2.2. Work with colleagues to set objectives that align with those of the organisation.	 2.1 Outline direction: Department strategy document Team strategy document Project plans Presentations 2.2 Set objectives: Organisational objectives Team meeting notes Appraisals and PDP's SMART objectives



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement.	 3.1. Communicate the agreed direction to individuals within own area of responsibility. 3.2. Collect feedback to inform improvement in own area of responsibility. 	 3.1 Communicate agreed direction: Presentations Plans Team meeting notes Informal meetings Appraisals and PDP's 3.2 Collect feedback: Team feedback Manager feedback Customer feedback Supplier feedback



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to assess own leadership performance.	4.1. Assess feedback on own leadership performance.4.2. Evaluate own leadership performance.	 4.1 Assess feedback: Summary of feedback Feedback mapped against job role competencies 4.2 Evaluate own performance: Areas for improvement Leadership improvement plan Meeting notes with mentor Own appraisal and PDP



Unit Reference Number: L/506/5291

Level: 5

Credit Value: 7 GLH:

30

Unit Grading Structure: Pass

Sector Subject Area: 15.2 Administration, 15.3 Business Management

Unit Summary

Unit Title:

This unit will enable learners to manage the process of collaboratively working with other organisations.

This unit has 5 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to evaluate potential collaborative opportunities with other organisations.	 1.1. Determine organisations that share common or complementary objectives to own organisation. 1.2. Evaluate the feasibility of collaboration with identified organisations. 1.3. Evaluate the potential benefits of collaboration. 1.4. Develop a business case for collaboration with identified organisations. 	 1.1 Determine organisations that have common or complementary objectives: Strategic supplier appraisal Procurement marketing 1.2 Evaluate feasibility of collaboration: Feasible study Partnership appraisal 1.3 Evaluate benefits of collaboration: Cost benefit analysis Evaluation of procurement benefits in terms of cost reduction, risk reduction and supplier innovation 1.4 Develop business case: Business case Procurement strategy Stakeholder dialogue



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
Be able to agree the strategic aims and objectives of collaboration.	2.1. Agree the strategic aims and objectives of collaboration internally and with other organisations.2.2. Agree the benefits each organisation expects to receive from collaboration.	 2.1 Agree strategic aims of collaboration: Joint objective setting meetings Objective presentations to stakeholders 2.2 Agree benefits: Joint benefit expectation meetings Cost, risk, time and innovation benefits



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to agree methods and expected outcomes of collaboration.	 3.1. Agree the actions each organisation will take and when. 3.2. Agree the expected outcomes of collaboration. 3.3. Agree arrangements for communication. 3.4. Agree process of collaboration review. 	 3.1 Agree actions: Contract documentation Joint working plans Partnering roles and responsibilities 3.2 Agree outcomes: Qualitative outcomes Quantitative outcomes 3.3 Agree communication arrangements: Frequency of communication Methods of communication Review meeting periods 3.4 Agree review process: Service level agreement Milestones Key performance indicators 360 degree feedback Formal of reviews including scorecards and dashboards



LEARNIN	IG OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learn	er will:	The learner can:	
collab	le to instigate and sustain a orative relationship with another isation.	4.1. Implement agreed actions at agreed times.4.2. Maintain communication and provide support to other organisations.	 4.1 Implement actions: Performance improvement initiatives Collaborative working Shared wins 4.2 Communication and support: Joint working group meetings Quality circles and continuous improvement team meetings Inter organisational dialogue
	le to review and evaluate the oration with another organisation.	5.1. Review and evaluate the extent to which the aims and objectives of collaboration have been achieved.5.2. Determine any changes to be made to the collaboration if it were to continue.	 5.1 Review performance: Key performance indicators Collaboration performance reports Joint review meetings inter organisational with key stakeholders 5.2 Determine changes: Stakeholder dialogue to agree changes to the collaboration Revised partnership agreement Revised contract documentation



Unit Reference Number: J/506/5290

Level: 5

Credit Value: 6
GLH: 30

Unit Grading Structure: Pass

Sector Subject Area: 15.3 Business Management

Unit Summary

Unit Title:

This unit will provide learners with the knowledge and skills to design and implement a technology strategy.

This unit has 3 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to develop a strategy to promote the use of technology, in line with organisational values and customer needs.	 1.1. Examine current use of technology in meeting customer needs within an organisation. 1.2. Identify good practice in the use of technology through benchmarking activities. 1.3. Assess opportunities to increase productivity through the use of technology. 1.4. Develop a technology strategy to increase productivity through the promotion of technology in line with organisational values and customer needs. 1.5. Develop criteria to evaluate the success of the technology strategy. 	 Technology audit Technology customer satisfaction Technology performance review 1.2 Identify good practice thorough benchmarking: Benchmarking of technology performance against best practise 1.3 Opportunities to increase productivity: Technology gap analysis in meeting productivity and customer needs 1.4 Develop technology strategy: Technology options to fill gap Option appraisal cost / benefit analysis Technology choice Technology strategy 1.5 Criteria to evaluate the strategy: Timescale criteria Cost criteria Deliverables and productivity criteria Customer satisfaction criteria



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to implement a strategy for promoting technology across an organisation.	2.1. Communicate a technological strategy across an organisation.2.2. Implement the technological strategy across the organisation.	 2.1 Communicate technology strategy: Presentation of strategy to stakeholder Stakeholder communication Stakeholder dialogue 2.2 Implement the technology strategy: Procurement of new technology Training in the use of new technology Stakeholder dialogue Appointment of technical champions



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
3. Be able to monitor and review the impact of an organisation's technology strategy, in line with best practice. Output Description:	 3.1. Monitor the implementation of a technology strategy across an organisation. 3.2. Evaluate the success of a technology strategy against success criteria. 	 3.1 Monitor the implementation: Performance data collection Gap analysis between achieved performance and targets Technology strategy implementation performance reports 3.2 Evaluate the success: Evaluation of strategy performance against key success criteria Benchmarking reports Stakeholder dialogue Revised strategy document



Unit Reference Number: R/506/5289

Level: 5

Credit Value: 4

GLH: 25

Unit Grading Structure: Pass

Sector Subject Area: 15.3 Business Management

Unit Summary

Unit Title:

This unit will enable learners to participate in a full recruitment exercise.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

All units are assessed by a portfolio of evidence.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to review human resource requirements to meet business objectives in own area of responsibility.	 1.1. Examine the human resources required to meet objectives in own area of responsibility. 1.2. Determine gaps between current and required human resources to meet objectives. 1.3. Assess the options for human resource requirements to meet objectives. 	 1.1 Examine the human resource requirement: Work plans and objectives Job roles to meet work plans Organograms Competence framework for required job roles 1.2 Gap analysis: Gap analysis showing shortfalls of people and skills required to meet objectives 1.3 Options for human resource requirements: Development options for existing staff Recruitment options for new staff



2.	Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements.	 2.1. Explain how to ensure recruitment and selection processes are fair. 2.2. Explain how to ensure that legal requirements, industry regulations, organisational policies and professional codes are met. 2.3. Explain when to seek specialist expertise throughout the recruitment process. 	 2.1 Ensure recruitment process is fair: Compliance with procedures for recruitment Compliance with any ring fence procedures in terms of organisation shrinkage Application of agreed quantifiable selection criteria Compliance with non-discrimination and equality regulations and law Cross functional interview panel 2.2 Legal requirements: Organisation policies and procedures for recruitment Specialist support from human resource function Specialist support from legal functions Third party advisory bodies and institutes 2.3 When to seek specialist expertise: Role of human resources function Compliance with organisation recruitment procedures
3.	Be able to participate in the recruitment and selection process.	3.1. Consult with relevant colleagues to produce or update job descriptions.	 3.1 Consult with colleagues to agree job descriptions: Dialogue with stakeholders to agree job role statements and job specifications



LEARNING OUTCOMES	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
The learner will:		
	 3.2. Agree with colleagues the stages in the recruitment and selection process for identified vacancies. 3.3. Determine the methods and criteria that will be used in the recruitment and selection process. 3.4. Assess and select candidates using agreed methods and criteria. 	 Dialogue with stakeholders to agree competence requirements for job role Job descriptions 3.2 Agree stages in recruitment process: Job advertisement and method of advertisement Shortlisting process Interviewing process including psychometric testing and assessment centres as appropriate Candidate evaluation process and job offer 3.3 Methods and criteria to be used: Interview questions Assessment centre activities Psychometric testing results Interview score sheets Selection evaluation meeting notes Job offer letters



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to evaluate the recruitment and selection process.	4.1. Evaluate the recruitment and selection methods and criteria used in own area of responsibility.4.2. Propose ways to improve future recruitment and selection.	 4.1 Evaluate methods used: Stakeholder debriefing meeting Lessons learnt document 4.2 Propose ways to improve recruitment: Dialogue with human resources on how to improve the recruitment process Lessons learnt and recommendations for improvement



Unit Title: Quality Management

Unit Reference Number: Y/506/5276

Level: 5

Credit Value: 6

GLH: 35

Unit Grading Structure: Pass

Sector Subject Area: 7.2 Warehousing and Distribution

Unit Summary

This unit will help learners to understand the theory of quality management and be able to implement a quality management system.

This unit has 4 learning outcomes.

Assessment Methodology

This unit is assessed using evidence from the workplace including physical products of work such as reports, plans, meeting notes, documentation and correspondence. Assessment can also be undertaken through witness testimonies, observable performance, professional discussion and questioning.

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LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Understand how to evaluate the range of quality management systems appropriate for use in business.	 1.1. Analyse quality definitions within business. 1.2. Analyse different quality management techniques. 1.3. Explain the similarities and key differences between the different techniques identified. 	 1.1 Quality definitions: Fit for purpose and the user based approach Product based approach and measurable quality Sale of Goods Act and Implied Terms relating to quality ISO 9000 and quality standards 1.2 Analyse different quality techniques: Total quality management Quality assurance six sigma Quality circles 1.3 Similarities and differences in techniques: Quality assurance v TQM Six sigma v quality circles



LEARNING OUTCOMES	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
The learner will:		
Understand the advantages of an organisation having a quality management system in place.	2.1. Analyse the benefits of operating a quality management system.2.2. Analyse the impact of a quality management system on own organisation.	 2.1 Benefits of quality management systems: Cost benefits Productivity benefits Product differentiation benefits Lead time reduction benefits Enabling a pull demand system to work effectively Delighted customers Lean supply chains Reduction in waste 2.2 Impact in own organisation: Quality team projects and results Quality improvement reports Quality metrics and benchmarking



LEARNING OUTCOMES	ASSESSMENT CRITERIA	INDICATIVE CONTENT
The learner will:	The learner can:	
Be able to implement quality control processes.	3.1. Analyse different quality control processes.3.2. Implement appropriate quality control processes in own organisation.	 3.1 Analyse different quality control processes: Quality assurance and quality control Statistical process control (SPC) and continuous quality control Sampling and batch quality control Quality control delegated to first tier suppliers 3.2 Implement QC processes in own organisation: Agreement of quality control processes with stakeholders Quality control procedures and systems Quality control records



LEARNING OUTCOMES	ASSESSMENT CRITERIA The learner can:	INDICATIVE CONTENT
The learner will:		
4. Be able to implement quality management processes to improve organisational performance.	 4.1. Analyse quality management processes in relation to continuous improvement within own organisation. 4.2. Implement quality management processes within own organisation to improve organisational performance. 	 4.1 Analyse quality continuous improvement processes: Total quality management Kaizen Poka-yoke Six sigma 4.2 Implement quality management processes: Review of quality management processes with stakeholders Selection of quality management system and processes Training of quality champions Quality improvement project reports





enquiries@gatewayqualifications.org.uk www.gatewayqualifications.org.uk Tel: 01206 911 211