

Unit Title: Lead and manage meetings (D11)
 Unit Number: 32
 Level: 3
 Credit value: 4
 Guided learning hours: 20
 Unit expiry date: 28/02/2015

Unit purpose and aim

This unit will ensure that learners are able to prepare for, lead and follow up issues identified in meetings.

Learning Outcomes	Assessment Criteria	Exemplification
1 Be able to prepare to lead a meeting.	1.1 Perform activities needed to be carried out in preparation for leading a meeting. 1.2 Produce documentation in support of activities.	This may include: <ul style="list-style-type: none"> • Purpose of the meeting • Identify participants • Fix a suitable time and venue, giving plenty of notice • Clarify objectives • Set agenda. This may include: <ul style="list-style-type: none"> • Outline of meeting objectives • Detail participant's roles • Obtain a suitable meeting room, booking requests • Prepare and send out invitations • Prepare agenda.
2 Be able to manage meeting procedures.	2.1 Identify any formal procedures that apply in own organisation.	This may include: <ul style="list-style-type: none"> • Inform the attendee's direct manager • Standing orders • Meeting room protocol • Fixed agendas • Introductions including Health and Safety and meeting adjournment procedures.

Learning Outcomes	Assessment Criteria	Exemplification
3 Be able to chair a meeting.	<p>3.1 Manage the agenda in co-operation with participants to ensure meeting objectives are met.</p> <p>3.2 Produce minutes of the meeting and allocate action points after discussions.</p>	<p>This may include:</p> <ul style="list-style-type: none"> • Review of any previous meetings objectives • Clarification of each meeting objective • Time allotted to each objective or topic • Allotted spokesperson to complete his/her section before moving on • Chair person control of discussions and debate. <p>This may include:</p> <ul style="list-style-type: none"> • Structured, and written based upon the meeting agenda • Capture all points crucial to the discussion or debate • Offer the minutes to the attendees as a true account of the meeting content.
4 Be able to undertake post-meeting tasks.	<p>4.1 Explain that the minutes of the meeting provide an accurate record of proceedings.</p> <p>4.2 Communicate and follow up meeting outcomes to relevant individuals.</p> <p>4.3 Evaluate whether the meeting's objectives were met and identify potential improvements.</p>	<p>This may include:</p> <ul style="list-style-type: none"> • Provision of the minutes to the attendees as a true account of the meeting content. <p>This may include:</p> <ul style="list-style-type: none"> • Providing a communication of the meeting outcomes and assigning actions to individuals. <p>This may include:</p> <ul style="list-style-type: none"> • Checking that action points and decisions are worked upon • Set objectives have been achieved from meeting • All individuals affected by the decisions are aware of outcomes.

Assessment

This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier.

Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

Evidence requirements

In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

Guidance on assessment and evidence requirements

You should consult with your assessor to agree the most appropriate sources of evidence available to you in your environment. Examples of possible sources of evidence are shown below but this is not a definitive list nor are the examples shown mandatory:

- Minutes of meetings with stakeholders and team members

Details of relationship between the unit and national occupational standards

Management and Leadership NOS unit D11 Lead meetings

Resources

Stationery or a CD-rom.

Access to photocopier, PC and printer is desirable but not essential.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850).

OCR Level 3 NVQ in Team Leading

Evidence Record Sheet

Unit D11 Lead and manage meetings

I confirm that the evidence provided is a result of my own work.

Signature of candidate: _____ Date: _____

Evidence reference	Evidence title	Assessment method	LO1		LO2	LO3		LO4		
			1.1	1.2	2.1	3.1	3.2	4.1	4.2	4.3

I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor: _____ Name (in block capitals): _____ Date: _____

Countersignature of qualified assessor (if required) and date: _____

IV initials (if sampled) and date: _____ Countersignature of qualified IV (if required) and date: _____

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