

# ILM LEVEL 3 and LEVEL 5 AWARDS AND CERTIFICATES IN LEADERSHIP

## C O N T E N T S

These Programme Specifications are provided by the Institute of Leadership & Management as a base-line quality document to assure consistent standards of provision and assessment across centres. They must form the basis for all programmes leading to the qualifications to which they refer, and will be used by External Verifiers and Regional/National Managers to monitor activity. **Please note that the original qualifications launched by ILM at Level 4 remain unchanged, but are now deemed to be at Level 5 in the NEW National Qualifications Framework.**

### OVERVIEW OF QUALIFICATIONS

▪ Special Note	3
▪ Aims	4
▪ Entry Requirements	4
▪ Progression	4
▪ ILM Membership	4
▪ Summary of Units and Segments	5

### PROGRAMME REQUIREMENTS

▪ Induction	6
▪ One-to-one Support	6
▪ Action Learning	6
▪ Assessment and Internal Quality Assurance	7
▪ External Verification	8
▪ Review and Evaluation	9
▪ Certification Criteria and Final Results – Awards Only	9
▪ Certification Criteria and Final Results – Certificates Only	10

### EXAMPLES OF PROGRAMME MODELS 11

### APPENDICES

<b>1</b>	<b>Level 3 Units</b>	13
	▪ Unit L1	14
	▪ Unit L2	25
<b>2</b>	<b>Level 5 Units</b>	35
	▪ Unit S1	36
	▪ Unit S2	47
<b>3</b>	<b>Action Learning</b>	57
<b>4</b>	<b>Occupational Expertise Requirements</b>	61
<b>5</b>	<b>Mapping to National Occupational Standards</b>	63
<b>6</b>	<b>ILM Resources for Leadership</b>	69

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***ILM Disclaimer***

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## ILM LEVEL 3 and LEVEL 5 AWARDS and CERTIFICATES in LEADERSHIP

### OVERVIEW OF QUALIFICATIONS

#### Special Note

These programmes have been designed in a unit-based format in anticipation of the development of future ILM qualifications. Each unit currently has the following common components, though additional items may be added to provide further support for centres:

- Title
- Learning outcomes
- Assessment – criteria and methods
- Level (as defined within the new National Qualifications Framework)
- Guided learning hours (glh)<sup>1</sup> and the notional learning time (nlt)<sup>2</sup> and
- Notional credit value (where 1 credit = 10 hours of notional learning time)

Contrary to former ILM practice, the terms “Award” and “Certificate” do not imply any specific level, but denote the volume of achievement. Qualification outlines are shown below.

<b>Level 3 Award in Leadership</b>	<b>Level 3 Certificate in Leadership</b>
<p>Approx 20 glh, or 30 hrs nlt, for</p> <ul style="list-style-type: none"> <li>• Unit L1: Understanding Leadership</li> </ul> <p>Assessment is by a Personal Reflection on Leadership (approx 1600 words)</p>	<p>Approx 60 glh, or 110 hrs nlt, for</p> <ul style="list-style-type: none"> <li>• Unit L1 Understanding Leadership</li> <li>• Unit L2 The Leadership Journey, including participation in action learning sets</li> </ul> <p>Assessment is by a Personal Reflection, a Personal Action Plan and a Leadership Log</p>
<b>Level 5 Award in Leadership</b>	<b>Level 5 Certificate in Leadership</b>
<p>Approx 20 glh, or 30 hrs nlt, for</p> <ul style="list-style-type: none"> <li>• Unit S1: Leadership Theory and Practice</li> </ul> <p>Assessment is by a Personal Reflection on Leadership (approx 2000 words)</p>	<p>Approx 60 glh, or 130 hrs nlt, for</p> <ul style="list-style-type: none"> <li>• Unit S1 Leadership Theory and Practice</li> <li>• Unit S2 Plan, Analyse and Evaluate the Leadership Journey, including participation in action learning sets</li> </ul> <p>Assessment is by a Personal Reflection, a Personal Action Plan and a Leadership Log</p>

<sup>1</sup> Guided learning hours are the direct contact hours experienced by the learner.

<sup>2</sup> Notional learning time is defined as the time it would take an “average” learner to complete the unit, including independent study, work-based learning and preparation of assessed work. One credit is to be based upon 10 notional learning hours.

## **Aims**

- The Leadership Awards aim to develop an understanding of leadership skills
- The Leadership Certificates aim to develop both understanding and application of leadership skills at the relevant level

Level 3 qualifications are suitable for . . .

- team leaders and first line managers, especially those who are new to the role, or who need to enhance their people leading skills, and/or
- individuals who would not necessarily be identified as managers or team leaders, but who have a leadership role or need leadership skills at work, in the community, in sport or recreation

Level 5 qualifications are suitable for . . .

- middle managers, especially those who are new to the role, or who need to enhance their people leading skills, and/or
- individuals who would not necessarily be identified as managers, but who have a more senior leadership role or need more advanced leadership skills at work, in the community, in sport or recreation

## **Entry Requirements**

There are no formal entry requirements for these programmes. However, in order to benefit from this programme, candidates should normally possess communication skills appropriate to the level of qualification they seek to achieve. Certificate candidates require the opportunity to practice leadership consistently within a workplace or similar setting.

## **Progression**

Where a candidate has completed an Award in Leadership and later wishes to progress to the Certificate in Leadership at the same level, then exemption from Unit L1/S1, as appropriate, is granted in its entirety, including assessment. This applies within a period of 3 years from completion of the relevant Award.

Candidates may progress to other programmes leading to various leadership, management development or coaching/mentoring qualifications at higher levels.

## **ILM Membership**

Successful completion of the Level 3 Award or Certificate in Leadership may provide eligibility for Associate Membership (AMInstLM) of the Institute of Leadership & Management – depending upon actual experience.

Successful completion of the Level 5 Award or Certificate in Leadership may provide eligibility for Membership (MInstLM) of the Institute of Leadership & Management – depending upon actual experience.

Full details are available from ILM Lichfield on 01543 251346 or e-mail: [membership@i-l-m.com](mailto:membership@i-l-m.com)

## **Summary of Units and Segments**

### **LEVEL 3**

#### **Unit L1 Understanding Leadership**

- L1.1 The Leadership Role and Different Leadership Styles
- L1.2 Self-leadership and Understanding Oneself
- L1.3 Connecting the Team with Vision and Strategy
- L1.4 Motivating and Developing the Team

#### **Unit L2 The Leadership Journey**

- L2.1 Leadership Journey Planning and Review
- L2.2 Action Learning for Leadership

### **LEVEL 5**

#### **Unit S1 Leadership Theory and Practice**

- S1.1 The Leadership Role and Leadership Theories
- S1.2 Emotional Intelligence and Self-leadership
- S1.3 Setting and Communicating Direction
- S1.4 Winning and Maintaining Commitment

#### **Unit S2 Plan, Analyse and Evaluate the Leadership Journey**

- S2.1 Leadership Journey Planning, Analysis and Evaluation
- S2.2 Action Learning for Leadership and Organisational Development

#### **Unit specifications are to be found in**

- Appendix One for Level 3 (page 13)
- Appendix Two for Level 5 (page 35)

## **PROGRAMME REQUIREMENTS**

### **Induction**

Each programme must commence with a (minimum) 2 hours induction session for Awards, or 3 hours for Certificates, and provide written information for participants covering relevant aspects such as:

- an outline of the qualification, its aims, and the benefits to the individual and their organisation
- the format of the programme – content, hours, attendance patterns
- the assessment requirements
- the candidate support resources available, and the roles and responsibilities of participants, centre staff and ILM
- learning and study skills – with special reference to using open or on-line learning if applicable
- information on equal opportunities, appeals procedures and support mechanisms
- ILM membership

### **One-to-one support**

- Candidates should receive support from a suitably qualified and experienced tutor to assist with their leadership development
- This is expected to be on a one-to-one basis and not less than 2 hours per candidate for Awards and not less than 5 hours per candidate for Certificates. This may include face-to-face, telephone and/or electronic contact
- Records of this support should be maintained for external verification purposes

### **Action learning for Certificate candidates**

- Centres must implement action learning techniques for Units L2 and S2 for all Certificate candidates, and provide an auditable summary of meeting outcomes (which is separate from, and in addition to, the personal records completed by candidates in their Leadership Logs)
- Information and guidance is provided in Appendix 3 on page 57
- The total allowance for action learning should be at least 6 hours for the initial meeting to establish the action learning sets, plus 22 hours for their subsequent meetings, during which time the tutor must be available.
- Centres should provide outline information to the RNM about the content and format of the initial meeting, and their plans for facilitating the action learning aspect of the programme.

## **Assessment and Internal Quality Assurance (IQA)**

These qualifications are independently assessed. This is defined as:

- internal assessment by a suitably qualified tutor/trainer at the approved centre (refer to Appendix 4)
- internal quality assurance by a suitably qualified tutor/trainer at the approved centre (refer to Appendix 4)
- external verification by the ILM EV of a minimum 30% sample of assessed work (refer to page 8)

External assessment by ILM is not available for these qualifications.

Centre staff responsibilities are to:

- make prior arrangements for any special considerations or reasonable adjustments to assessment for individual candidates where necessary, in accordance with the procedures in Section 9 of the ILM Centre Manual, following initial consultation with the ILM EV and/or Regional/ National Manager
- provide candidates with the specific pages from the relevant Unit L1 or S1 to ensure fair and consistent assessment
- assess all Unit assessment components in accordance with the marking scheme(s) and maintain records of assessment for a rolling period of 4 years
- maintain auditable records of the meetings of the action learning sets - including a summary of outcomes – which is in addition to the personal leadership logs completed by candidates
- internally quality assure the fairness and consistency of all assessments by sampling a minimum of 15% of the group's work, and maintain records of internal quality assurance activity for a rolling period of 4 years
- facilitate access to candidates for the EV who will wish to speak to some members of the group – this may be conducted either face-to-face or by telephone

The ILM External Verifier will externally verify at least 30 per cent of each group's work, and may revise outcomes if deemed necessary, after discussion with centre staff. The ILM EV will also wish to examine assessment and IQA records

Candidates who are unsuccessful at their first attempt at any assessment component may resubmit it once ONLY before their results are notified to ILM London

## External Verification

Briefly, the ILM External Verifier has four main functions:

- to conduct holistic monitoring of the centre's operations against the original accreditation documentation (and any current amendments), and overall compliance with the requirements of ILM
- to monitor standards of specific programme provision and assessment
- to support and advise centres in establishing and developing effective programmes
- to act as a channel of information between centres and ILM

Information about the systematic monitoring of the Centre's activities by the EV is provided in Section 5 of the Centre Manual. However, with particular reference to the Leadership Award and Certificate External Verifier will independently assess the qualifications and monitor standards through visits and/or postal verification by:

- advising on any special considerations or reasonable adjustments which may be required by individual candidates in respect of the assessment(s), and approving minor adjustments. (Significant adjustments must be pre-arranged with ILM using the form in Section 9 of the Centre Manual)
- monitoring that the programme is conducted in accordance with ILM requirements as set out in these Specifications, including monitoring records of the action learning activities
- verifying a representative sample of 30 per cent of the assessments, moderating marks if necessary (after discussion with centre staff)
- speaking with a small number of candidates from each group to check the effectiveness of the programme, especially the action learning aspects. This may be either face-to-face, or more likely, by telephone
- monitoring the effectiveness of the centre's internal quality assurance systems/records
- countersigning the Schedule of Results (SOR) and recommending the issue of certificates to the listed candidates - before the SOR is sent to ILM London

To initiate the external verification process, the Centre is required to

- register candidates at the start of the programme and not later than ONE week from commencement. ILM will send a copy of the Registration List to the External Verifier, at the same time as this is sent to the centre.
- inform the External Verifier of the programme dates well in advance, so that there is time to make visit arrangements for this programme

The External Verifier will normally visit an active centre twice each year according to the level of activity. Such visits may cover several types of programme. Postal verification may be used to complement visits, where this is an effective and efficient alternative.

Telephone, fax or e-mail contact will normally be used to enhance effective contact between centres and External Verifiers. File notes of centre/EV contact are maintained for audit purposes, in addition to the standard documentation which is completed at visits.

Whilst the External Verifier is the routine contact between centres and the Institute, support is also available from the Regional/National Manager and ILM London.

## Review and Evaluation

- All aspects of programme delivery, assessment, support mechanisms and record-keeping should be reviewed and evaluated by the programme team. The views of all parties, including participants and sponsors should be sought. This is particularly relevant for Leadership qualifications, where the use of action learning may be less familiar to programme teams.
- The External Verifier will wish to see records of such reviews, and evidence of follow-up actions to continuously improve the programme. Minutes of team meetings, and especially the records of action learning activities, may be valuable evidence and contribute to the holistic monitoring of the centre's activities

## Certification Criteria and Final Results – AWARDS ONLY

An Award in Leadership at the appropriate level is awarded to participants who satisfactorily complete, within one year from initial registration, all the learning and assessment requirements for

- Unit L1 (for Level 3) or
- Unit S1 (for Level 5)

ILM believes that at this stage in their development, participants should be given every opportunity to meet the requirements. Therefore candidates may re-take the assessment component once only **before** the results are notified to ILM London.

There are THREE possible final outcomes which may be indicated on the Schedule of Results for the Award: **PASS** or **FAIL** or **DID NOT COMPLETE**

There are THREE possible final outcomes which will be listed on the Results List from ILM London: **PASS** or **FAIL** or **DID NOT COMPLETE**.

- In the event of a **FAIL** result the candidate would be required to undergo the entire programme of study and assessment again if they wish to continue working towards the qualification.
- In the event of a **DID NOT COMPLETE** result the candidate would be required to complete the assessment process and have the result notified to ILM within the remaining period of registration, if they wish to continue working towards the qualification.

Outcomes may be notified to the participants after the EV has countersigned the Schedule of Results. There is no need to wait until the official Results List is received from ILM London, provided that it is made clear that the results are subject to ratification by ILM

## **Certification Criteria and Final Results – CERTIFICATES ONLY**

A Certificate in Leadership at the appropriate level is awarded to participants who satisfactorily complete, within three years of initial registration, the learning and assessment requirements for

- Units L1 and L2 (for level 3) or
- Units S1 and S2 (for Level 5)

ILM believes that participants should be given every opportunity to meet the requirements. Therefore candidates may re-take each of the three assessment components once only **before** the results are notified to ILM London.

There are THREE possible final outcomes which may be indicated for each assessment component on the Schedule of Results for the full Certificate: **PASS** or **FAIL** or **DID NOT COMPLETE**.

- **PASS** means that a candidate has completed the assessment component successfully.
- **FAIL** means that a candidate has not completed the assessment component successfully.
- **DID NOT COMPLETE** means that a candidate has not submitted the assessment component at all

There are FOUR possible final outcomes which will be listed on the Results List from ILM London: **PASS** or **REFERRAL** or **FAIL** or **DID NOT COMPLETE**

- A **PASS** result means that the candidate has completed both Units (L1 + L2 for Level 3 or Units S1 + S2 for Level 5) successfully and has been awarded the Level 3 or Level 5 Certificate in Leadership, as appropriate
- A **FAIL** result in ONE assessment component only will be notified on the Results List as a **REFERRAL** result, which means that a candidate may re-submit a single assessment component ONE further time within a three month period from the date of notification. If successful, the candidate will be issued with the full Certificate.
- A **FAIL** result in more than one assessment component will be notified on the Results List as a **FAIL**, and the candidate would be required to undergo the entire programme of study and assessment again if they wish to continue working towards the qualification.
- Outcomes may be notified to the participants after the EV has countersigned the Schedule of Results. There is no need to wait until the official Results List is received from ILM London, provided that it is made clear that the results are subject to ratification by ILM.
- In the event of a **DID NOT COMPLETE** result, the candidate would be required to complete the assessment process and have the result notified to ILM within the remaining period of registration to continue working towards the qualification.

## EXAMPLES OF LEVEL 3 OR LEVEL 5 PROGRAMME MODELS

The following models show examples of Level 3 or 5 Leadership Award and Certificate programmes; they are not intended as prescriptive formats, but may be used as a basis for creating innovative and effective programmes to meet the needs of participants, sponsors and centres themselves. (*References to Units L1/2 refer to Level 3, and Units S1/2 refer to Level 5*)

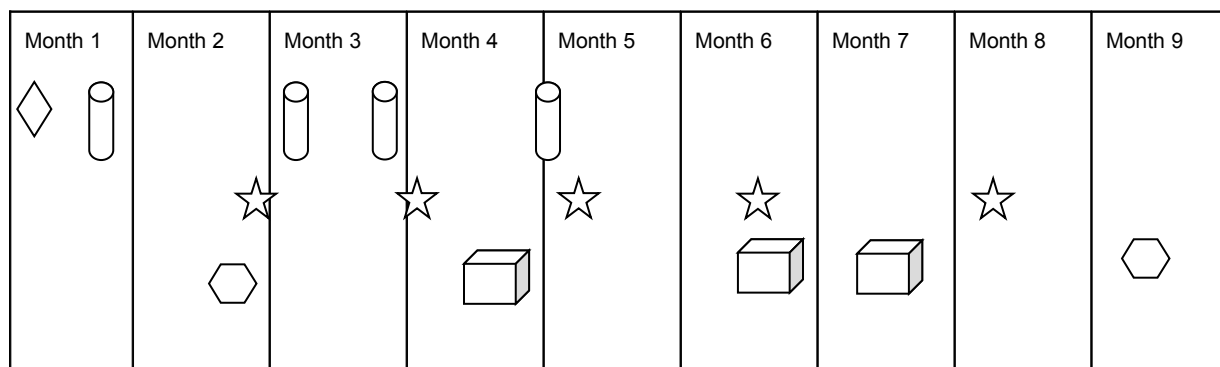
There are two main variables in the overall design of the programme:

- the way in which the two parts are organised in relation to each other
- the overall timescale of the programme (note the minimum permissible length for Unit L2 or S2 is six months)

The following programmes illustrate different approaches that could be taken.

### Parallel programme

This nine-month programme introduces Unit L2/S2 alongside, but in the early stages of, Unit L1/S1. It allows centres to provide Award and Certificate programmes concurrently, as some learners may wish to gain credit after the end of Unit L1/S1 if needed (ie the Award), but it assumes participants will complete the full programme (ie the Certificate). The example shows the segments as single 4 hour blocks, but they could equally be divided into shorter sessions e.g. to allow them to run in the evening. The action learning meetings are also 5-6 hour blocks; it is not recommended that they are much shorter than this.



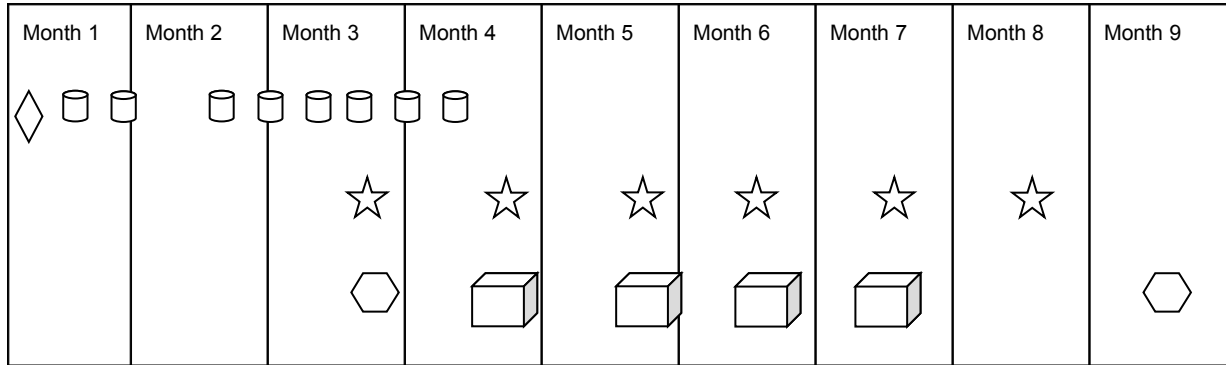
Key: Unit L1/S1: ◇ = Induction      ○ = 4-hour segment      ☆ = tutorial

Unit L2/S2: ⬡ = Initial Group Building session/Presentation

⬢ = Action Learning

**Sequential programme**

This nine-month programme completes Unit L1 in the first three months and runs Unit L2 over the next six months. In this example Unit L1 could be run in the evenings, with two sessions per segment. The centre still runs 5/6-hour action learning blocks, but has included four of them. The initial tutorials are arranged so that they could be used for learners being assessed for Unit L1 credit, as well as those completing Unit L2 for the Certificate.



Key: Unit L1/S1: ◇ = Induction    ○ = 2-hour session    ☆ = tutorial  
 Unit L2/S2: ⬡ = Initial Group Building session/Presentation  
 ⊠ = Action Learning

**RESOURCES FOR LEADERSHIP QUALIFICATIONS**

ILM supplies a range of resources through its Learning Support and Development Division. For details of items of particular relevance to these Leadership qualifications, please refer to Appendix 6 on page 69

# Appendix One

# Level 3 Award and Certificate in Leadership

## Unit Specifications

Unit L1: Understanding Leadership Page: 14

Unit L2: The Leadership Journey Page: 25

**UNIT L1      UNDERSTANDING LEADERSHIP****Guided Learning Hours: 20****Notional Learning Time: 30 hours****NQF Level: 3****Notional Credit Value: 3****Unit Requirements**

In order to achieve this unit, candidates will need to

- undergo a short induction of at least 2 hours,
- complete the learning outcomes from the 4 segments (approximately 4 hours each),
- receive at least 2 hours of tutorial guidance
- and satisfactorily complete the assessment Task – a Personal Reflection on Leadership which may be presented in written or oral format

**Unit Summary**

Unit L1 provides the knowledge and understanding that the team leader or first line manager needs to appreciate the leadership role at this level and develop an awareness of the skills required to apply this knowledge in their context. It is also appropriate to people involved in leading others in a community, voluntary, sporting or similar context.

**Delivery Guidance Notes for Tutors**

Inputs must be made in a way that requires participants to create a dialogue between theory and practice. It is not sufficient to teach theoretical aspects and expect participants to apply them later.

The segments should be developed and applied in the context of the learner's work, and centres should ensure that the depth and contextual interpretation of the four segment themes are appropriate for the learners.

Centres are encouraged to provide a variety of learning experiences for participants, including workshops, case-studies, videos, role-play and simulation

**Key Skills Signposting**

The following Key Skills are developed through this Unit:

Communication: Level 3	C3.2a	Take part in a group discussion
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**SEGMENT SPECIFICATIONS**

*Note that MSC references in brackets after each segment title indicate a link to Units of the 2004 Leadership and Management national occupational standards (NOS). These links do not imply full coverage of the NOS unit requirements*

<b>L1.1 The Leadership Role and Different Leadership Styles (MSC Unit B6)</b>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<ol style="list-style-type: none"> <li>1. Explain the basic characteristics of the leadership role</li> <li>2. Describe at least three different styles of leadership and their strengths and limitations</li> <li>3. Explain how these leadership styles may be appropriate to different individuals, contexts and teams</li> <li>4. Explain the importance of a leader being able to adapt different leadership styles to different situations</li> </ol>	<ul style="list-style-type: none"> <li>• The basic characteristics of the leadership role in terms of: <ul style="list-style-type: none"> <li>▪ taking responsibility</li> <li>▪ understanding and continuously working towards overall vision and strategy</li> <li>▪ translating strategy into objectives for teams and individuals</li> <li>▪ thinking ‘outside the box’</li> <li>▪ assisting change management</li> <li>▪ overcoming obstacles</li> <li>▪ communicating and motivating</li> <li>▪ supporting and developing teams and individuals</li> <li>▪ modelling appropriate behaviour</li> <li>▪ representing the team and feeding back its experiences and views</li> </ul> </li> <li>• Models of leadership styles and their strengths and limitations</li> <li>• How different leadership styles may be appropriate to different situations, teams and individuals</li> <li>• The importance of being able to use different leadership styles in different situations and with different teams and individuals</li> </ul>

<b>L1.2 Self Leadership and Understanding Oneself</b> <span style="float: right;"><b>(MSC Unit A2)</b></span>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<ol style="list-style-type: none"> <li>1. Describe the importance of being aware of their own emotions and the impact that these have on themselves and on others in a work context</li> <li>2. Recognise their own strengths and limitations in the leadership role and the importance of continuously developing themselves</li> <li>3. Appreciate the importance of playing to their own strengths and displaying confidence and self-assurance</li> <li>4. Explain the importance and characteristics of self-leadership</li> </ol>	<ul style="list-style-type: none"> <li>• The concept of emotional intelligence and how it applies to the leadership role</li> <li>• The importance of understanding one's own strengths and limitations</li> <li>• Using and interpreting a basic technique to identify their own strengths and limitations</li> <li>• The importance of continuous self-development and how to identify opportunities to develop oneself in the leadership role</li> <li>• The importance of leaders displaying confidence and self-assurance and to do this by playing to own strengths</li> <li>• The characteristics of self-leadership in terms of: <ul style="list-style-type: none"> <li>▪ controlling their own emotions, particularly when under stress</li> <li>▪ being open and honest with others</li> <li>▪ being flexible</li> <li>▪ setting challenging but realistic objectives for themselves and others</li> <li>▪ being prepared to take risks</li> <li>▪ taking the initiative when necessary</li> <li>▪ seeing setbacks as opportunities rather than threats</li> </ul> </li> </ul>

<b>L1.3 Connecting the Team with Vision and Strategy</b> <span style="float: right;"><b>(MSC Unit B6)</b></span>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<ol style="list-style-type: none"> <li>1. Explain the importance of organisations or projects having a vision and strategy</li> <li>2. Describe in basic terms how vision and strategy translate into team objectives</li> <li>3. Explain the importance of the team having a common sense of purpose that supports the overall vision and strategy</li> <li>4. Explain the key role that communication plays in establishing a common sense of purpose</li> <li>5. Describe and practice effective communication skills</li> </ol>	<ul style="list-style-type: none"> <li>• The importance of the organisation having a vision, mission and strategy and what the strategy means for first line leadership</li> <li>• How to develop team objectives that support overall strategy and vision</li> <li>• The importance of a team having a common sense of purpose that links to vision and strategy</li> <li>• The role that effective communication plays in conveying the overall mission of the organisation or project and how the collective work of the team and it's individual members support this</li> <li>• Effective techniques for communicating vision, goals and objectives in terms of: <ul style="list-style-type: none"> <li>▪ choosing effective times and places to communicate with the team and individuals</li> <li>▪ selecting appropriate communication methods</li> <li>▪ communicating clearly and accurately</li> <li>▪ active listening skills</li> <li>▪ receiving and responding appropriately to feedback.</li> </ul> </li> </ul>

<b>L1.4 Motivating and Developing the Team</b>		<b>(MSC Unit B6)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
<p>6. Explain the importance of the leader being able to motivate teams and individuals and gain their commitment to objectives</p> <p>7. Describe the main motivational factors in a work context and how these may apply to different situations, teams and individuals</p> <p>8. Explain the importance of the leader supporting the team and its individual members and give practical examples of when this will be necessary</p> <p>9. Explain the role that the leader plays in developing the team and its members</p> <p>10. Describe basic techniques for developing the team and its members.</p>	<ul style="list-style-type: none"> <li>• The critical importance of teams and individuals being motivated and committed to their objectives</li> <li>• A range of theories of motivation, for example: <ul style="list-style-type: none"> <li>▪ Maslow's Hierarchy</li> <li>▪ MacGregor's Theory X and Theory Y</li> <li>▪ Herzberg's Two Factor Theory</li> <li>▪ Vroom's Expectancy Theory</li> <li>▪ McClelland's 3-Needs Theory</li> </ul> </li> <li>• Motivational factors that are available to the leader, for example: <ul style="list-style-type: none"> <li>▪ safety and security</li> <li>▪ sense of belonging and common purpose</li> <li>▪ respect</li> <li>▪ empathy</li> <li>▪ recognition of achievement</li> <li>▪ involvement in decision making</li> <li>▪ sense of fulfilment</li> <li>▪ self-development</li> <li>▪ material rewards</li> <li>▪ sanctions</li> </ul> </li> <li>• An appreciation of how these factors can apply to different situations, teams and individuals</li> <li>• How to select and use appropriate motivational factors</li> <li>• Giving feedback on performance</li> <li>• Basic support needs that individuals may have and how to meet these</li> <li>• The role of continuous development and its importance to the team and individual members</li> <li>• The importance of coaching to the leader's role</li> <li>• Basic coaching techniques</li> </ul>	

**ASSESSMENT REQUIREMENTS**

- Unit L1 is assessed by a single component: a Personal Reflection on Leadership (which may be presented in either written or oral format).
- Whilst this assessment component stands alone for achievement of this Unit, it also provides an effective springboard into Unit L2 where candidates intend to complete the Level 3 Certificate in Leadership.
- The following two pages (20/21) should be copied and provided to candidates, to ensure fair and consistent assessment across all centres.
- Pages 22/23 must be used as a Mark Sheet, and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback.

## **UNIT L1      UNDERSTANDING LEADERSHIP – ASSESSMENT**

### **Task: Personal Reflection on Leadership**

The purpose of this task is to encourage you to demonstrate your achievement of the learning outcomes from this Unit through a reflective evaluation of your own (or another's) leadership performance, preferably in the workplace though if necessary, some other appropriate scenario (such as a community, voluntary or sporting context) may be used.

Select at least TWO Learning Outcomes from EACH of the four segments in this Unit, and for each one reflect upon your own performance as a leader in relation to it. Your reflection should clearly demonstrate that you understand the concepts involved and that you have an awareness of the relevant Knowledge, Understanding and Skills

If you are not in a leadership situation, then you may critically reflect on the performance of another person with whom you have direct contact in a leadership context. You may NOT write about a leader with whom you do not have direct contact, eg a national sports manager!

You will be expected to spend some time researching for this Task, and perhaps talking to colleagues who may help you gain insight into your own leadership performance (or that of your selected other).

Your work should be clearly presented – either in written OR oral format as below – and plainly indicate your two chosen learning outcomes from each of the four segments

**Written:** This should preferably be word-processed. Whilst ILM does not prescribe a specific word-count for this assessment, it is unlikely that adequate coverage of the requirements would be achieved in less than 1600 words. You should be aware that the level of language, quality and appearance of your work can affect its impact upon others and thus, their perception of your leadership ability.

**Oral:** Your presentation must be supported by notes, slides or cue cards (for quality monitoring purposes) and is likely to be at least 10 minutes' duration. You should be aware that your presentation skills can affect the impact upon others of your work and thus, their perception of your leadership ability.

**Assessment Criteria**

<ul style="list-style-type: none"> <li>• Candidate's own (or acceptable other's) leadership performance is <u>evaluated</u> against TWO of the Learning Outcomes from EACH of the four segments within this Unit. A simple description is insufficient – there must be some critical judgement of performance in relation to the chosen eight Learning Outcomes</li> </ul>	<p><i>5 marks for each of the 8 Learning Outcomes covered, maximum 40 marks</i></p>
<ul style="list-style-type: none"> <li>• Responses demonstrate an understanding of the concepts embodied in the chosen Learning Outcomes, and awareness of the relevant Knowledge, Understanding and Skills for each of the eight chosen Learning Outcomes</li> </ul>	<p><i>5 marks for each of the 8 Learning Outcomes covered, maximum 40 marks</i></p>
<ul style="list-style-type: none"> <li>• Presentation of the work demonstrates a level of personal impact commensurate with effective leadership</li> </ul>	<p><i>maximum 20 marks</i></p>

At least 50 marks from a possible 100 are required in this Task in order to pass

**UNIT L1 UNDERSTANDING LEADERSHIP – ASSESSMENT****Personal Reflection on Leadership - Assessment Criteria and Centre Guidance**

Candidates must demonstrate that they have undertaken a reflective evaluation of either their own or another person's leadership performance, and that they have developed some insight into the effectiveness of the leadership performance. The following guidance is designed to help Centres make objective and consistent judgements about whether or not the Personal Reflection on Leadership assessment meets these requirements.

**These TWO pages must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback.**

**ASSESSMENT CRITERIA**

*Critically evaluate leadership performance:*

- The candidate is able to identify some strengths and weaknesses in the leadership performance in a insightful, reasonably objective, fair and honest way.

*Demonstrate of knowledge, understanding and skills:*

- The candidate demonstrates an understanding of concepts embodied in the two selected LOs from each segment, and shows the relevance of this knowledge, understanding and skills to leadership practice.

**Candidate Name:**

\_\_\_\_\_

ELEMENTS OF THE PERSONAL REFLECTION ON LEADERSHIP ASSESSMENT		MARKS GAINED
Segment L1.1:	Evaluate leadership performance (first selected LO from L1.1)	/5
	Demonstration of knowledge, understanding and skills (first selected LO from L1.1)	/5
	Evaluate leadership performance (second selected LO from L1.1)	/5
	Demonstration of knowledge, understanding and skills (second selected LO from L1.1)	/5
Segment L1.2:	Evaluate leadership performance (first selected LO from L1.2)	/5
	Demonstration of knowledge, understanding and skills (first selected LO from L1.2)	/5
	Evaluate leadership performance (second selected LO from L1.2)	/5
	Demonstration of knowledge, understanding and skills (second selected LO from L1.2)	/5
Segment L1.3:	Evaluate leadership performance (first selected LO from L1.3)	/5
	Demonstration of knowledge, understanding and skills (first selected LO L1.3)	/5
	Evaluate leadership performance (second selected LO L1.3)	/5
	Demonstration of knowledge, understanding and skills (second selected LO L1.3)	/5
Segment L1.4:	Evaluate leadership performance (first selected LO L1.3)	/5
	Demonstration of knowledge, understanding and skills (first selected LO L1.4)	/5
	Evaluate leadership performance (second selected LO L1.4)	/5
	Demonstration of knowledge, understanding and skills (second selected LO L1.4)	/5
Presentation:		
Written <input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Use of language is likely to influence others positively</li> <li>• Clear structure provides a positive impression of leadership ability</li> </ul>	/10
Oral <input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Visual/Personal presentation is likely to make a positive impact on others</li> </ul>	/5
<b>Total Marks out of 100 =</b>		<b>Pass</b> <input type="checkbox"/> (min 50) <b>Resubmit</b> <input type="checkbox"/> <b>Fail (2<sup>nd</sup> attempt)</b> <input type="checkbox"/>

<b>Assessor's comments</b>		
<b>Assessor initials and date</b>	<b>IQA initials and date</b>	<b>EV initials and date</b>
	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>

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## **UNIT L2 THE LEADERSHIP JOURNEY**

**Guided Learning Hours: 40**

**Notional Learning Time: 80 hours**

**NQF Level: 3**

**Notional Credit Value: 8**

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### **Unit Requirements**

In order to achieve this unit, candidates will need to

- undergo a short induction of at least 1 hour,
- complete the learning outcomes from the 2 segments (approximately 4 hours each),
- receive at least 3 hours of tutorial guidance on a one-to-one basis
- attend an initial group-building session of at least 6 hours' duration
- participate in at least five action learning set meetings (at least 22 hours in total) as prescribed in the guidance in Appendix 3, and
- satisfactorily complete both assessment Tasks

over a period of not less than 6 months

### **Unit Summary**

Unit L2 provides the supportive environment that the team leader or first line manager needs to develop and gain confidence in their leadership capacity at this level. It is equally suitable for those whose roles in non-work contexts demand leadership ability.

### **Delivery Guidance Notes for Tutors**

The essential feature of this unit is that learners take responsibility for their own learning and leadership development, with the support and guidance of both the tutor and their peers. This should be achieved by tackling real leadership challenges that are brought to the group situation by its individual members.

Not only will this provide a nurturing environment within which the individual can develop as an effective leader in the short term (minimum six months), but will provide the learning and development skills necessary for the lifelong improvement of their leadership capacity as their career unfolds. Effective leadership involves a complex set of behaviours and heightened awareness of self and others, rather than functional management knowledge and skills, and it develops alongside the individual's confidence in their ability to lead and support others in a range of contexts.

It is NOT acceptable to deliver this unit using didactic teaching/training methods or distance learning. However, innovative use of virtual meetings may be acceptable for the action learning sets, provided that the contributions of individual group members are clearly auditable. Proposals should be discussed with the ILM Regional/National Manager at accreditation. Guidance on setting up and facilitating action learning sets is provided in Appendix 3. ILM External Verifiers will monitor the suitability of delivery methods adopted by centres, with particular emphasis on action learning activities.

Auditable summaries of action learning set activities must be maintained by centres for monitoring purposes – in addition to the leadership logs maintained by the individual candidates.

## Key Skills Signposting

The following Key Skills are developed through this Unit:

Communication: Level 3	C3.2a	Take part in a group discussion
Improving own learning and performance: Level 3	LP3.1	Set targets using information from appropriate people and plan how these will be met
	LP3.2	Take responsibility for your learning, using your plan to help meet targets and improve your performance
	LP3.3	Review progress and establish evidence of your achievements
Problem solving: Level 3	PS3.1	Explore a problem and identify different ways of tackling it
	PS3.2	Plan and implement at least one way of solving the problem
	PS3.3	Check if the problem has been solved and review your approach to problem solving
Working with others: Level 3	WO3.1	Plan work with others
	WO3.2	Seek to develop co-operation and check progress towards your agreed objectives
	WO3.3	Review work with others and agree ways of improving collaborative work in the future

## SEGMENT SPECIFICATIONS

*Note that MSC references in brackets after each segment title indicate a link to Units of the 2004 Leadership and Management national occupational standards (NOS). These links do not imply full coverage of the NOS unit requirements. For full mapping refer to Appendix 5*

<b>L2.1 Leadership Journey Planning and Review</b>		<b>(MSC Unit A2)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
11. Recognise own leadership strengths and limitations 12. Identify and plan appropriate actions to develop their leadership capacity 13. Identify sources of help and support 14. Set realistic time scales for leadership development 15. Understand how to recognise and confirm improvements in own leadership performance	<ul style="list-style-type: none"> <li>• Personal strengths and limitations analysis – building on the assessment undertaken for Unit L1</li> <li>• Importance of a systematic approach to developing effective leadership skills</li> <li>• Setting objectives for leadership development and their application to work and other contexts</li> <li>• Techniques for developing personal leadership capacity</li> <li>• Sources of information, help and support for leadership development, including theorists, tutors, practising/model leaders, colleagues</li> <li>• How to overcome blockages and obstacles to leadership development</li> <li>• Review and monitoring techniques</li> <li>• Gaining feedback from others on own leadership performance</li> </ul>	

<b>L2.2 Action Learning for Leadership</b>		<b>(MSC Unit A2)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
<p>16. Explain the nature and benefits of action learning and its role in own leadership development</p> <p>17. Explain the responsibilities of an individual within an action learning set or group</p> <p>18. Use action learning to develop own and others' leadership performance</p> <p>19. Reflect on, critically analyse, and record own leadership performance improvement</p>	<ul style="list-style-type: none"> <li>• The nature of Action Learning (L=P+Q) as a development medium and the role of the Action Learning Set, the 'Client' and the 'Set Advisor' (<i>refer to Appendix 3</i>)</li> <li>• Learning styles and the impact of own learning style on role and behaviour in AL set</li> <li>• Techniques for researching problems and questioning techniques to explore problems, reflection and hypothesis forming</li> <li>• Sources of 'programmed' learning to development knowledge and skills</li> <li>• The political and emotional aspects of the group process</li> </ul>	

## **Assessment Requirements**

Unit L2 is assessed by two components:

1. A Leadership Action Plan, covering the learning outcomes of segment L2.1, which sets the scene for the practical development activities to be undertaken in the leadership journey.
  - Pages 29/30 should be provided for the guidance of candidates
  - Page 31 provides assessment guidance for centres, and should be used as a mark sheet, with a copy to provide feedback for candidates.
2. A Leadership Log, which records the action learning and any other relevant activities undertaken by the learner in the course of the leadership journey to develop their performance over a period of not less than six months
  - Pages 32/33 should be provided for the guidance of candidates
  - Page 34 provides assessment guidance for centres, and should be used as a mark sheet, with a copy to provide feedback for candidates.

## **UNIT L2 THE LEADERSHIP JOURNEY - ASSESSMENT**

### **Task 1: Leadership Action Plan**

The purpose of this task is to build upon your insight into the effectiveness of your (or your another's) leadership performance developed in Unit L1. There are two choices, depending on whether you have analysed your own (Option A) or someone else's (Option B) leadership performance. Extensive and detailed plans are not required, but you should demonstrate your ability to learn from your earlier reflections and combine this with the learning outcomes from segment L2.1 in this Unit, to plan how you will systematically improve your performance throughout your personal leadership journey (task 2).

#### Option A

Prepare a brief action plan to improve upon your leadership performance, identifying strengths and limitations in your own leadership performance and ways in which you can overcome or improve at least two of your weaker areas. Determine:

- what help you will need, and from whom
- what time scale you envisage for the improvement in performance
- how you will know when your performance has improved.

You are strongly advised to use the headings below to structure your work:

1. My strengths and limitations as a leader
2. Methods to overcome my limitations as a leader
3. What help will be needed, and from whom
4. The planned timescale for improvement
5. How developments in my leadership performance could be measured

#### Option B

Where you studied the leadership performance of another person, you should prepare an action plan for yourself in the light of what you have learned from observing their performance, and demonstrate how you can use this awareness to develop as an effective leader yourself. In this case, your work should be structured like this:

1. What I have learned from observing my chosen person's leadership performance in relation to my strengths and limitations as an effective (potential) leader
2. Methods to develop myself as a (potential) leader
3. What help will be needed, and from whom
4. Planned timescale for development
5. How developments in my leadership performance could be measured

**Assessment Criteria**

<ul style="list-style-type: none"> <li>• Own leadership strengths and limitations are recognised</li> </ul>	<i>5 marks each, maximum 10 marks</i>
<ul style="list-style-type: none"> <li>• At least three appropriate actions are identified to develop own leadership capacity</li> </ul>	<i>5 marks for each, maximum 15 marks</i>
<ul style="list-style-type: none"> <li>• At least two realistic sources of help and support are identified</li> </ul>	<i>2 marks each, maximum 4 marks</i>
<ul style="list-style-type: none"> <li>• A realistic time scale is planned for leadership development activities</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• At least two ways in which outcomes of leadership development activities can be measured are identified</li> </ul>	<i>3 marks each, maximum 6 marks</i>

At least 20 marks from a possible 40 marks are required in this Task in order to pass

**Task 1: Leadership Action Plan - Assessment Criteria and Mark Sheet**

Candidates must demonstrate that they have effectively used their insight (developed though Unit L1) into their own/another's performance together with the learning outcomes from segment L2.1 to plan how they will develop their own leadership performance. The following guidance is designed to help centres make objective and consistent judgements about whether or not the Leadership Action Plan assessment meets these requirements.

**This page must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback**

**Candidate Name:** \_\_\_\_\_

<b>ELEMENTS OF THE LEADERSHIP ACTION PLAN ASSESSMENT</b>		<b>ASSESSMENT CRITERIA</b>	<b>MARKS GAINED</b>
1	Own leadership strengths and limitations are recognised	• <i>Own leadership strengths are recognised</i>	/5
		• <i>Own leadership limitations are recognised</i>	/5
2	Appropriate actions are identified to develop own leadership capacity	• <i>At least three ways are proposed for which are capable of developing leadership capacity at the appropriate level</i>	/15
3	Realistic sources of help and support are identified	• <i>The sources of help and support are appropriate to the need</i>	/4
4	A realistic time scale is planned for leadership development activities	• <i>The timescale shows some appreciation of the rate at which development of leadership ability can occur and also the need to develop those skills in a timely way</i>	/5
5	Ways in which outcomes of leadership development activities can be measured are identified	• <i>The ways of measuring outcomes relate to outcomes which are relevant to leadership performance</i>	/6
<b>Assessor's comments</b>			
<b>Total marks achieved out of 40:</b>		<b>OUTCOME:</b> (CIRCLE AS APPROPRIATE)	
		PASS ( <i>Min 20</i> )      UNSATISFACTORY	
<b>Assessor Initials and date</b>	<b>IQA initials and date</b>	<b>EV initials and date</b>	
	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	

## **UNIT L2 THE LEADERSHIP JOURNEY- ASSESSMENT**

### **Task 2: Leadership Log**

You will need to participate in action learning sets organised by your ILM centre. There will normally be an initial group-building session of around 6 hours, followed by at least five sessions totalling not less than 22 hours spread over a period of at least six months.

In order to contribute to your own development and that of your peer group, you will also need to spend approximately 1.5-2 hours per week in activities, which you have planned, outside the action learning sessions. Your tutor will provide support and guidance throughout.

The leadership journey must be recorded in a Leadership Log, which may be presented in written, audio or video format, and requires you to:

20. Use your action learning set to establish, reflect on and review at least three personal learning objectives relating to own practice as a leader
21. Demonstrate development of leadership skills and abilities through action learning, meeting the personal learning objectives
22. Use your action learning set to reflect on your own and others' leadership qualities, skills and approaches and their effectiveness in different situations
23. Through action learning, acquire and demonstrate an understanding of relevant leadership principles in the context of personal practice
24. Modify your own leadership approach in response to feedback and evaluation from the members of the action learning set, and others, in order to improve effectiveness

Throughout the Learning Log and your reflections on these five aspects of your development as a leader you should explain the contribution of the Action Learning Set in the process. This requires that you include some reference to discussing:

- your learning objectives with the AL Set members and taking account of their comments
- your leadership behaviour in the AL Set, inviting others' feedback on it and their assessment of how well it demonstrates your achievement of your personal learning objectives
- how your leadership behaviour might have been different in other situations, and why this might be necessary.

**Assessment criteria**

<ul style="list-style-type: none"> <li>• Demonstrates insight into own leadership abilities and implications for improvement</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Shows evidence of inviting and listening to the contribution of other members of the AL Set in this process</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Describes how leadership performance has improved</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Shows evidence of having invited the critical review of members of the AL Set in identifying appropriate leadership behaviour</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Shows insight into the appropriateness of particular leadership behaviour and how this might change in other situations</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Refers to models of leadership to explain and justify particular behaviour</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Demonstrates a willingness actively to invite feedback from members of the AL Set and others and use this to change leadership behaviour</li> </ul>	<i>10 marks</i>

At least 25 marks from a possible 50 marks are required in this Task in order to pass

**Task 2: Leadership Log - Assessment Criteria and Mark Sheet**

Candidates must demonstrate that they have effectively used their insight (developed though Unit L1) into their own/another's performance together with the learning outcomes from segment L2.2 to develop their own leadership performance. The following guidance is designed to help centres make objective and consistent judgements about whether or not the Leadership Log meets these requirements.

**This page must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback**

**Candidate Name:** \_\_\_\_\_

ELEMENTS OF THE LEADERSHIP LOG ASSESSMENT	ASSESSMENT CRITERIA	MARKS GAINED
1. Use your action learning set to establish, reflect on and review at least three personal learning objectives relating to own practice as a leader	<ul style="list-style-type: none"> <li>• <i>Demonstrates insight into own leadership abilities and implications for improvement</i></li> <li>• <i>Shows evidence of inviting and listening to the contribution of other members of the AL Set in this process</i></li> </ul>	/5  /5
2. Demonstrate development of leadership skills and abilities through action learning, meeting the personal learning objectives	<ul style="list-style-type: none"> <li>• <i>Describes how leadership performance has improved</i></li> <li>• <i>Shows evidence of having invited the critical review of members of the AL Set in identifying appropriate leadership behaviour</i></li> </ul>	/10  /5
3. Use your action learning set to reflect on your own and others' leadership qualities, skills and approaches and their effectiveness in different situations	<ul style="list-style-type: none"> <li>• <i>Shows insight into the appropriateness of particular leadership behaviour and how this might change in other situations</i></li> </ul>	/10
4. Through action learning, acquire and demonstrate an understanding of relevant leadership principles in the context of personal practice	<ul style="list-style-type: none"> <li>• <i>Refers to models of leadership to explain and justify particular behaviour</i></li> </ul>	/5
5. Modify your own leadership approach in response to feedback and evaluation from the members of the action learning set, and others, in order to improve effectiveness	<ul style="list-style-type: none"> <li>• <i>Demonstrates a willingness actively to invite feedback from members of the AL Set and others and use this to change leadership behaviour</i></li> </ul>	/10
<b>Assessor's comments</b>		
<b>Total marks achieved out of 50:</b>		<b>OUTCOME:</b> (CIRCLE AS APPROPRIATE)  PASS ( <i>min 25</i> )      UNSATISFACTORY
<b>Assessor Initials and date</b>	<b>IQA initials and date</b>  Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	<b>EV initials and date</b>  Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>

# Appendix Two

## Level 5 Award and Certificate in Leadership

### Unit Specifications

Unit S1: Leadership Theory and Practice	Page: 36
Unit S2: Plan, Analyse and Evaluate the Leadership Journey	Page: 47

**UNIT S1 LEADERSHIP THEORY AND PRACTICE****Guided Learning Hours: 20****Notional Learning Time: 30 hours****NQF Level: 4****Notional Credit Value: 3****Unit Requirements**

In order to achieve this unit, candidates will need to

- undergo a short induction of at least 2 hours,
- complete the learning outcomes from the 4 segments (approximately 4 hours each),
- receive at least 2 hours of tutorial guidance
- and satisfactorily complete the assessment Task – a Personal Reflection on Leadership which may be presented in written or oral format

**Unit Summary**

Unit S1 provides the knowledge and understanding that the middle or senior manager needs to appreciate the leadership role at this level and develop an awareness of the skills required to apply this knowledge in their context. It is also appropriate to people involved in leading others in a community, voluntary, sporting or similar context.

**Delivery Guidance Notes for Tutors**

Inputs must be made in a way that requires participants to create a dialogue between theory and practice. It is not sufficient to teach theoretical aspects and expect participants to apply them later.

The segments should be developed and applied in the context of the learner's work, and centres should ensure that the depth and contextual interpretation of the four segment themes are appropriate for the learners.

Centres are encouraged to provide a variety of learning experiences for participants, including workshops, case-studies, videos, role-play and simulation

**Key Skills Signposting**

The following Key Skills are developed through this Unit:

Communication: Level 4	C4.1	Develop a strategy for using communication skills over a period of time
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**SEGMENT SPECIFICATIONS**

Note that MSC references in brackets after each segment title indicate a link to Units of the 2004 Leadership and Management national occupational standards (NOS). These links do not imply full coverage of the NOS unit requirements

<b>S1.1 The Leadership Role and Leadership Theories (MSC Unit B6)</b>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<ol style="list-style-type: none"> <li>1. Explain the key responsibilities of the leadership role</li> <li>2. Describe at least three different theories of leadership and the leadership styles that each of these illustrates</li> <li>3. Evaluate at least four leadership styles and their application in the context of the learner's own organisation</li> <li>4. Explain how these leadership styles may be appropriate to different situations and people</li> <li>5. Explain the importance of a leader being able to draw on a repertoire of leadership styles to take account of different strategic and operational challenges.</li> </ol>	<ul style="list-style-type: none"> <li>• The key responsibilities of the leadership role in terms of: <ul style="list-style-type: none"> <li>▪ taking responsibility</li> <li>▪ contributing to overall vision and goals</li> <li>▪ setting and providing guidance on values</li> <li>▪ setting direction for significant programmes or projects</li> <li>▪ stimulating innovation and enterprise</li> <li>▪ anticipating, planning for and leading change</li> <li>▪ overcoming obstacles</li> <li>▪ delegating</li> <li>▪ setting objectives for teams and individuals</li> <li>▪ communicating and motivating</li> <li>▪ supporting and developing programmes, projects, teams and individuals</li> <li>▪ modelling appropriate behaviour</li> <li>▪ representing the team and feeding back its experiences and views</li> <li>▪ protecting the team and its members</li> </ul> </li> <li>• A range of leadership theories and different leadership styles these illustrate, for example: <ul style="list-style-type: none"> <li>▪ the trait approach to leadership</li> <li>▪ the behavioural school (MacGregor, Blake and Mouton)</li> <li>▪ the contingency or situational school (Fielder, Hersey-Blanchard, Tannenbaum and Smidt, Adair)</li> <li>▪ leaders and followers (Servant Leadership, Team Leadership, Transactional and Transformational)</li> <li>▪ Dispersed Leadership.</li> </ul> </li> <li>• How to evaluate the appropriateness of different leadership styles in the context of own responsibilities</li> <li>• The importance of being able to use a repertoire of leadership styles in different situations and with different people.</li> </ul>

<b>S1.2 Emotional Intelligence and Self-leadership</b>		<b>(MSC Unit A2)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
<ol style="list-style-type: none"> <li>1. Explain the concept of emotional intelligence and its importance to the leadership role</li> <li>2. Evaluate their own characteristics as a leader and identify their own strengths and limitations in the leadership role</li> <li>3. Recognise the importance of continuously developing themselves in the leadership role and develop plans and opportunities to do so</li> <li>4. Appreciate the importance of playing to their own strengths and displaying confidence and self-assurance</li> <li>5. Describe the importance of social awareness and relationship management to the leader's role</li> <li>6. Explain the importance and characteristics of self-leadership</li> </ol>	<ul style="list-style-type: none"> <li>• The concept of emotional intelligence as developed by different theorists and how it applies to the leadership role</li> <li>• The importance of understanding one's own strengths and limitations</li> <li>• Using and interpreting different techniques to identify their own characteristics, strengths and limitations</li> <li>• The importance of continuous self-development and how to identify opportunities to develop oneself in the leadership role</li> <li>• The importance of leaders displaying confidence and self-assurance and to do this by playing to own strengths and showing a readiness to take calculated risks</li> <li>• Social awareness in terms of: <ul style="list-style-type: none"> <li>▪ empathy</li> <li>▪ organisational and 'political' awareness</li> <li>▪ service to others</li> </ul> </li> <li>• Relationship management in terms of: <ul style="list-style-type: none"> <li>▪ inspiring</li> <li>▪ influencing</li> <li>▪ networking</li> <li>▪ conflict management</li> </ul> </li> <li>• The characteristics of self-leadership in terms of: <ul style="list-style-type: none"> <li>▪ controlling own emotions, particularly when under stress</li> <li>▪ being open and honest with others</li> <li>▪ showing integrity and trustworthiness</li> <li>▪ being flexible</li> <li>▪ setting challenging but realistic objectives for themselves and others</li> <li>▪ taking risks</li> <li>▪ taking personal responsibility for significant challenges</li> <li>▪ seeing setbacks as opportunities rather than threats</li> </ul> </li> </ul>	

<b>S1.3 Setting and Communicating Direction</b>		<b>(MSC Units B6)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
<ol style="list-style-type: none"> <li>1. Explain the importance of organisations or projects having a vision, goals and values and how these create a common sense of purpose</li> <li>2. Describe how to develop a vision, goals and values which are realistic and capable of inspiring others to achieve</li> <li>3. Describe the principles and importance of delegation and empowering others</li> <li>4. Evaluate how the principles of delegation and empowerment may apply in their own context</li> <li>5. Describe how to stimulate others to translate vision, goals and values into objectives and practical guides to action</li> <li>6. Explain the key role that communication, persuasion and negotiation play in establishing a common sense of purpose</li> <li>7. Evaluate the effectiveness of different communication, persuasion and negotiation skills in their own context</li> </ol>	<ul style="list-style-type: none"> <li>• How to develop vision and goals for significant projects or programmes of work</li> <li>• The importance of being aware of and analysing the internal and external environments in which the leader operates</li> <li>• Spotting opportunities</li> <li>• How to develop objectives and values that support overall strategy and vision</li> <li>• Theories and principles of delegating responsibility and empowering others</li> <li>• The role that effective communication plays in conveying overall vision and goals and how to win and maintain the commitment of teams and individuals to these</li> <li>• Effective techniques for: <ul style="list-style-type: none"> <li>▪ communicating both directly and indirectly with teams and individuals</li> <li>▪ persuading</li> <li>▪ negotiating</li> </ul> </li> <li>• How to select communication, persuasion and negotiation skills appropriate to different situations and people.</li> </ul>	

<b>S1.4 Winning and Maintaining Commitment</b>		<b>(MSC Unit B6)</b>
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>	
<ol style="list-style-type: none"> <li>1. Explain the importance of the leader being able to motivate others and gain their commitment to the vision and goals of significant projects or programmes of work</li> <li>2. Describe the complex interaction of motivational factors in a work context</li> <li>3. Evaluate how these may apply to different situations and people in their own context</li> <li>4. Explain the importance of the leader supporting others in achieving their goals and give practical examples of when this will be necessary</li> <li>5. Explain the role that the leader plays in developing others both directly and indirectly</li> <li>6. Describe and evaluate different techniques for developing others to achieve their objectives.</li> </ol>	<ul style="list-style-type: none"> <li>• The critical importance of the leader gaining the motivation and commitment of others</li> <li>• Critiques of the main theories of motivation, for example: <ul style="list-style-type: none"> <li>▪ Maslow's Hierarchy</li> <li>▪ MacGregor's Theory X and Theory Y</li> <li>▪ Herzberg's Two Factor Theory</li> <li>▪ Vroom's Expectancy Theory</li> <li>▪ McClelland's 3-Needs Theory</li> </ul> </li> <li>• Motivational factors that are available to the leader, for example: <ul style="list-style-type: none"> <li>▪ safety and security</li> <li>▪ sense of belonging and common purpose</li> <li>▪ respect</li> <li>▪ recognition of achievement</li> <li>▪ empowerment and self-actualisation</li> <li>▪ sense of fulfilment</li> <li>▪ personal and professional development</li> <li>▪ material rewards</li> <li>▪ sanctions</li> <li>▪ job roles and employment conditions</li> </ul> </li> <li>• How to evaluate motivational factors and select those that are appropriate to different situations and people</li> <li>• The leader's role in protecting and mentoring team members</li> <li>• Needs for mentoring and support that individuals may have and how to meet these</li> <li>• The role of continuous development and its importance to the organisation and to individuals</li> <li>• How to evaluate different methods of developing others, both directly and indirectly and how to choose methods most appropriate to the people involved.</li> </ul>	

**ASSESSMENT REQUIREMENTS**

- Unit S1 is assessed by a single component: a Personal Reflection on Leadership (which may be presented in either written or oral format).
- Whilst this assessment component stands alone for achievement of this Unit, it also provides an effective springboard into Unit S2 where candidates intend to complete the Level 5 Certificate in Leadership.
- The following pages (42/43) should be copied and provided to candidates, to ensure fair and consistent assessment across all centres.
- Pages 44/45 must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback.

## **UNIT S1 LEADERSHIP THEORY AND PRACTICE – ASSESSMENT**

### **Task: Personal Reflection on Leadership**

The purpose of this task is to encourage you to demonstrate your achievement of the learning outcomes from this Unit through a reflective evaluation of your own (or another's) leadership performance, preferably in the workplace though if necessary, some other appropriate scenario (such as a community, voluntary or sporting context) may be used.

Select at least TWO Learning Outcomes from EACH of the four segments in this Unit, and for each one reflect upon your own performance as a leader in relation to it. Your reflection should clearly demonstrate that you understand the concepts involved and that you have an awareness of the relevant Knowledge, Understanding and Skills

If you are not in a leadership situation, then you may critically reflect on the performance of another person with whom you have direct contact in a leadership context. You may NOT write about a leader with whom you do not have direct contact, eg a national sports manager!

You will be expected to spend some time researching for this Task, and perhaps talking to colleagues who may help you gain insight into your own leadership performance (or that of your selected other).

Your work should be clearly presented – either in written OR oral format as below – and plainly indicate your two chosen learning outcomes from each of the four segments

**Written:** This should preferably be word-processed. Whilst ILM does not prescribe a specific word-count for this assessment, it is unlikely that adequate coverage of the requirements would be achieved in less than 2000 words. You should be aware that the level of language, quality and appearance of your work can affect its impact upon others and thus, their perception of your leadership ability.

**Oral:** Your presentation must be supported by notes, slides or cue cards (for quality monitoring purposes) and is likely to be at least 10 minutes' duration. You should be aware that your presentation skills can affect the impact upon others of your work and thus, their perception of your leadership ability.

**Assessment Criteria**

<ul style="list-style-type: none"> <li>• Candidate's own (or acceptable other's) leadership performance is <u>evaluated</u> against TWO of the Learning Outcomes from EACH of the four segments within this Unit. A description is insufficient – there must be a high level of critical judgement of performance in relation to the chosen eight Learning Outcomes, identifying both strengths and weaknesses in leadership performance in an insightful, objective, fair, open and honest way.</li> </ul>	<p><i>5 marks for each of the 8 Learning Outcomes covered, maximum 40 marks</i></p>
<ul style="list-style-type: none"> <li>• Responses demonstrate an understanding of the complex concepts embodied in the chosen Learning Outcomes, and insight into the relevance of this knowledge, understanding and skills to leadership practice, recognising and resolving any differences and conflicts in theories and approaches.</li> </ul>	<p><i>5 marks for each of the 8 Learning Outcomes covered, maximum 40 marks</i></p>
<ul style="list-style-type: none"> <li>• Presentation of the work demonstrates a level of personal impact commensurate with effective leadership</li> </ul>	<p><i>maximum 20 marks</i></p>

At least 50 marks from a possible 100 are required in this Task in order to pass

**UNIT S1 LEADERSHIP THEORY AND PRACTICE – ASSESSMENT****Personal Reflection on Leadership - Assessment Criteria and Centre Guidance**

For each of the four segments in this Unit, Candidates must demonstrate that they have undertaken a reflective evaluation of either their own or another person's leadership performance, and that they have developed some insight into the effectiveness of the leadership performance. They must do this by focussing on at least two Learning Outcomes (LO) from each segment, critically evaluating the leadership performance and demonstrating an appropriate level of knowledge, understanding and skills. The following guidance is designed to help centres make objective and consistent judgements about whether or not the Personal Reflection on Leadership assessment meets these requirements.

**ASSESSMENT CRITERIA**

<i>Critically evaluate leadership performance:</i>
<ul style="list-style-type: none"> <li>The candidate is able to identify both strengths and weaknesses in the leadership performance in an insightful, objective, fair, open and honest way.</li> </ul>
<i>Demonstrate of knowledge, understanding and skills:</i>
<ul style="list-style-type: none"> <li>The candidate demonstrates an understanding of the complex concepts embodied in the two selected LOs from each segment, and an insight into the relevance of this knowledge, understanding and skills to leadership practice, recognising and resolving any differences or conflicts in theories and approaches.</li> </ul>

**Candidate Name:** \_\_\_\_\_

ELEMENTS OF THE PERSONAL REFLECTION ON LEADERSHIP ASSESSMENT		MARKS GAINED
Segment S1.1:	Critically evaluate leadership performance (first selected LO from S1.1)	/5
	Demonstration of knowledge, understanding and skills (first selected LO from S1.1)	/5
	Critically evaluate leadership performance (second selected LO from S1.1)	/5
	Demonstration of knowledge, understanding and skills (second selected LO from S1.1)	/5
Segment S1.2:	Critically evaluate leadership performance (first selected LO from S1.2)	/5
	Demonstration of knowledge, understanding and skills (first selected LO from S1.2)	/5
	Critically evaluate leadership performance (second selected LO from S1.2)	/5
	Demonstration of knowledge, understanding and skills (second selected LO from S1.2)	/5
Segment S1.3:	Critically evaluate leadership performance (first selected LO from S1.3)	/5
	Demonstration of knowledge, understanding and skills (first selected LO S1.3)	/5
	Critically evaluate leadership performance (second selected LO S1.3)	/5
	Demonstration of knowledge, understanding and skills (second selected LO S1.3)	/5
Segment S1.4:	Critically evaluate leadership performance (first selected LO S1.3)	/5
	Demonstration of knowledge, understanding and skills (first selected LO S1.4)	/5
	Critically evaluate leadership performance (second selected LO S1.4)	/5
	Demonstration of knowledge, understanding and skills (second selected LO S1.4)	/5
Presentation:		
Written <input type="checkbox"/>	<ul style="list-style-type: none"> <li>Use of language is likely to influence others positively</li> </ul>	/10
Oral <input type="checkbox"/>	<ul style="list-style-type: none"> <li>Clear structure provides a positive impression of leadership ability</li> <li>Visual/Personal presentation is likely to make a positive impact on others</li> </ul>	/5 /5

<b>Total Marks out of 100 =</b>	<b>Pass</b> <input type="checkbox"/> ( <i>min 50</i> )	<b>Resubmit</b> <input type="checkbox"/>	<b>Fail (2<sup>nd</sup> attempt)</b> <input type="checkbox"/>
<b>Assessor's comments</b>			
<b>Assessor initials and date</b>	<b>IQA initials and date</b>	<b>EV initials and date</b>	
	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	

**These pages must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback.**

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## **UNIT S2     PLAN, ANALYSE AND EVALUATE THE LEADERSHIP JOURNEY**

**Guided Learning Hours: 40**

**Notional Learning Time: 100 hours**

**NQF Level: 4**

**Notional Credit Value: 10**

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### **Unit Requirements**

In order to achieve this unit, candidates will need to

- undergo a short induction of at least 1 hour,
- complete the learning outcomes from the 2 segments (approximately 4 hours each),
- receive at least 3 hours of tutorial guidance on a one-to-one basis
- attend an initial group-building session of at least 6 hours' duration
- participate in at least 5 action learning set meetings (at least 22 hours in total) and
- satisfactorily complete both assessment Tasks

over a period of not less than 6 months

### **Unit Summary**

Unit S2 provides the supportive environment that a manager needs to develop and gain confidence in their leadership capacity at this level. It is equally suitable for those whose roles in non-work contexts demand leadership ability.

### **Delivery Guidance Notes for Tutors**

The essential feature of this unit is that learners take responsibility for their own learning and leadership development, with the support and guidance of both the tutor and their peers. This should be achieved by tackling real leadership challenges that are brought to the group situation by its individual members.

Not only will this provide a nurturing environment within which the individual can develop as an effective leader in the short term (minimum six months), but will provide the learning and development skills necessary for the lifelong improvement of their leadership capacity as their career unfolds. Effective leadership involves a complex set of behaviours and heightened awareness of self and others, rather than functional management knowledge and skills, and it develops alongside the individual's confidence in their ability to lead and support others in a range of contexts.

It is NOT acceptable to deliver this unit using didactic teaching/training methods or distance learning. However, innovative use of virtual meetings may be acceptable for the action learning sets, provided that the contributions of individual group members are clearly auditable. Proposals should be discussed with the ILM Regional/National Manager at accreditation. Guidance on setting up and facilitating action learning sets is provided in Appendix 3. ILM External Verifiers will monitor the suitability of delivery methods adopted by centres, with particular emphasis on action learning activities.

Auditable summaries of action learning set activities must be maintained by centres for monitoring purposes – in addition to the leadership logs maintained by the individual candidates.

## Key Skills Signposting

The following Key Skills are developed through this Unit:

Improving own learning and performance: Level 4	LP4.1	Develop a strategy for improving your own learning and performance
	LP4.2	Monitor progress and adapt your strategy to improve your performance
	LP4.3	Evaluate your strategy and present the outcomes of your learning
Problem solving: Level 4	PS4.1	Develop a strategy for problem solving
	PS4.2	Monitor progress and adapt your strategy for solving the problem
	PS4.3	Evaluate your strategy and present the outcomes of your problem solving skills
Working with others: Level 4	WO4.1	Develop a strategy for working with others
	WO4.2	Monitor progress and adapt your strategy to achieve agreed objectives
	WO4.3	Evaluate your strategy and present the outcomes from your work with others

### SEGMENT SPECIFICATIONS

*Note that MSC references in brackets after each segment title indicate a link to Units of the 2004 Leadership and Management national occupational standards (NOS). These links do not imply full coverage of the NOS unit requirements. Full details are in Appendix 5.*

<b>S2.1 Leadership Journey Planning, Analysis and Evaluation (MSC Unit A2)</b>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<ol style="list-style-type: none"> <li>1. Analyse own leadership strengths and limitations</li> <li>2. Identify, assess, select and plan appropriate actions to develop own leadership capacity</li> <li>3. Identify sources of help and support</li> <li>4. Set, monitor and adjust realistic time scales for leadership development</li> <li>5. Identify and make judgements about improvements in own leadership performance</li> </ol>	<ul style="list-style-type: none"> <li>• Personal strengths and limitations analysis – building on the assessment undertaken for Unit S1</li> <li>• The distinction between cognitive and affective skills and the effect of personality on the development and applications of these skills</li> <li>• Importance of a systematic approach to developing effective leadership skills</li> <li>• Setting objectives for leadership development and their application to work and other contexts</li> <li>• Techniques for developing personal leadership capacity</li> <li>• Sources of information, help and support for leadership development, including theorists, tutors, practising/model leaders, colleagues</li> <li>• How to overcome blockages and obstacles to leadership development</li> <li>• Monitoring, analysis and evaluation techniques</li> <li>• Gaining 360° feedback on own leadership performance</li> </ul>

<b>S2.2 Action Learning for Leadership and Organisational Development (MSC Unit A2)</b>	
<b>Learning Outcomes – on completion the candidate should be able to:</b>	<b>Knowledge, Understanding and Skills</b>
<p>25. Evaluate action learning as a leadership development technique and its role in own leadership development</p> <p>26. Explain the responsibilities of an individual within an action learning set and the dynamics of relationships within a set</p> <p>27. Engage actively in action learning to develop own and others' leadership performance</p> <p>28. Reflect on, critically analyse, make insightful judgements about and record own leadership performance improvement</p>	<ul style="list-style-type: none"> <li>• The nature of Action Learning (L=P+Q) as a development medium and the role of the Action Learning Set, the 'Client' and the 'Set Advisor' (<i>refer to Appendix 3</i>)</li> <li>• Learning styles and the impact of own learning style on role and behaviour in AL set</li> <li>• Techniques for researching problems and questioning techniques to explore problems, reflection and hypothesis forming</li> <li>• Sources of 'programmed' learning to develop knowledge and skills</li> <li>• The political and emotional aspects of the group process</li> </ul>

### **ASSESSMENT REQUIREMENTS**

Unit S2 is assessed by two components:

1. A Leadership Action Plan, covering the learning outcomes of segment S2.1, which sets the scene for the practical development activities to be undertaken in the leadership journey.
  - Pages 50/1 should be provided for the guidance of candidates
  - Page 52 provides assessment guidance for centres, and should be used as a mark sheet with feedback for candidates.
2. A Leadership Log, which records the action learning and any other relevant activities undertaken by the learner in the course of the leadership journey to develop their performance over a period of not less than six months
  - Pages 53/54 should be provided for the guidance of candidates
  - Page 55 provides assessment guidance for centres, and should be used as a mark sheet with feedback for candidates.

## **UNIT S2      PLAN, ANALYSE AND EVALUATE THE LEADERSHIP JOURNEY - ASSESSMENT**

### **Task 1:      Leadership Action Plan**

The purpose of this task is to build upon your insight into the effectiveness of your (or your another's) leadership performance developed in Unit S1. There are two choices, depending on whether you have analysed your own (Option A) or someone else's (Option B) leadership performance.

Extensive and detailed plans are not required, but you should demonstrate your ability to learn from your earlier reflections and combine this with the learning outcomes from segment S2.1 in this Unit, to plan how you will systematically improve your performance throughout your personal leadership journey. (This will be recorded in your personal Leadership Log, as Task 2 for this Unit)

#### Option A

Prepare a brief but demanding action plan to improve upon your leadership performance, identifying strengths and limitations in your own leadership performance and ways in which you can overcome or improve at least two of your weaker areas. Determine:

- what help you will need, and from whom
- what time scale you envisage for the improvement in performance
- how you will know when your performance has improved.

You are strongly advised to use the headings below to structure your work:

1. My strengths and limitations as a leader
2. Methods to overcome my limitations as a leader
3. What help will be needed, and from whom
4. The planned timescale for improvement
5. How developments in my leadership performance could be measured

#### Option B

Where you studied the leadership performance of another person, you should prepare an action plan for yourself in the light of what you have learned from observing their performance, and demonstrate how you can use this awareness to develop as an effective leader yourself. In this case, your work should be structured like this:

1. What I have learned from observing my chosen person's leadership performance in relation to my strengths and limitations as an effective (potential) leader
2. Methods to develop myself as a (potential) leader
3. What help will be needed, and from whom
4. Planned timescale for development
5. How developments in my leadership performance could be measured

**Assessment Criteria**

<ul style="list-style-type: none"> <li>• Own leadership strengths are recognised, in a way that demonstrates insight and self-awareness</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Own leadership limitations are critically analysed</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• At least three ways are proposed which are capable of developing leadership capacity at the appropriate level and which clearly stretch a candidate</li> </ul>	<i>5 marks for each, maximum 15 marks</i>
<ul style="list-style-type: none"> <li>• The sources of help and support are particularly appropriate to the need identified</li> </ul>	<i>2 marks each, maximum 4 marks</i>
<ul style="list-style-type: none"> <li>• The timescale shows a real appreciation of the rate at which development of leadership ability can occur, whilst placing some pressure on the candidate to develop those skills in a timely way</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• The ways of measuring outcomes show some sophistication and relate to outcomes which are important to leadership performance, and not necessarily those most susceptible to measurement</li> </ul>	<i>3 marks each maximum 6 marks</i>

At least 20 marks from a possible 40 marks are required in this Task in order to pass

**Task 1: Leadership Action Plan - Assessment Criteria and Mark Sheet**

Candidates must demonstrate that they have effectively used their insight (developed though Unit S1) into their own/another's performance together with the learning outcomes from segment S2.1 to plan how they will develop their own leadership performance. The following guidance is designed to help centres make objective and consistent judgements about whether or not the Leadership Action Plan assessment meets these requirements.

**This page must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback**

**Candidate Name:**

<b>ELEMENTS OF THE LEADERSHIP ACTION PLAN ASSESSMENT</b>		<b>ASSESSMENT CRITERIA</b>	<b>MARKS GAINED</b>
1	Own leadership strengths and limitations are identified and analysed	<ul style="list-style-type: none"> <li>• <i>Own leadership strengths are recognised, in a way that demonstrates insight and self-awareness</i></li> <li>• <i>Own leadership limitations are critically analysed</i></li> </ul>	 /5 /5
2	Appropriate and challenging actions are identified to develop own leadership capacity	<ul style="list-style-type: none"> <li>• <i>At least three ways are proposed which are capable of developing leadership capacity at the appropriate level and which clearly stretch a candidate</i></li> </ul>	/15
3	Realistic sources of help and support are identified	<ul style="list-style-type: none"> <li>• <i>The sources of help and support are particularly appropriate to the need identified</i></li> </ul>	/4
4	A realistic but demanding time scale is planned for leadership development activities	<ul style="list-style-type: none"> <li>• <i>The timescale shows a real appreciation of the rate at which development of leadership ability can occur, whilst placing some pressure on the candidate to develop those skills in a timely way</i></li> </ul>	/5
5	Ways in which significant outcomes of leadership development activities can be measured are identified	<ul style="list-style-type: none"> <li>• <i>The ways of measuring outcomes show some sophistication and relate to outcomes which are important to leadership performance, and not necessarily those most susceptible to measurement</i></li> </ul>	/6
<b>Assessor's comments</b>			
<b>Total marks achieved out of 40:</b>		<b>OUTCOME: (CIRCLE AS APPROPRIATE)</b>	
		PASS (Min 20)                      UNSATISFACTORY	
<b>Assessor Initials and date</b>	<b>IQA initials and date</b>	<b>EV initials and date</b>	

	Outcome: Pass <input type="checkbox"/>	Fail <input type="checkbox"/>	Outcome: Pass <input type="checkbox"/>	Fail <input type="checkbox"/>
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## **Task 2: Leadership Log**

You will need to participate in action learning sets organised by your ILM centre. There will normally be an initial group-building session of around 6 hours, followed by at least five sessions totalling not less than 22 hours spread over a period of at least six months.

In order to contribute to your own development and that of your peer group, you will also need to spend a considerable amount of time in activities, which you have planned, outside the action learning sessions – at least 2-3 hours per week. Your tutor will provide support and guidance throughout.

The leadership journey must be recorded in a Leadership Log, which may be presented in written, audio or video format, and requires you to:

1. Use your action learning set to establish, reflect on and review at least three significant personal learning objectives relating to your own practice as a leader
2. Demonstrate the clear development of leadership skills and abilities through action learning, meeting the personal learning objectives
3. Participate actively in your action learning set to help you reflect on your own and others' leadership qualities, skills and approaches and their effectiveness in different situations
4. Through action learning, acquire and demonstrate an understanding of relevant leadership principles in the context of personal practice
5. Modify your own leadership approach in response to feedback and evaluation from the members of the action learning set, and others, in order to improve effectiveness

Throughout the Learning Log and your reflections on these five aspects of your development as a leader you should explain the contribution of the Action Learning Set in the process. This requires that you include some reference to discussing:

- your learning objectives with the AL Set members and taking account of their comments
- your leadership behaviour in the AL Set, inviting others' feedback on it and their assessment of how well it demonstrates your achievement of your personal learning objectives
- how your leadership behaviour might have been different in other situations, and why this might be necessary.

**Assessment Criteria**

<ul style="list-style-type: none"> <li>• Demonstrates clear insight into own leadership abilities and implications for improvement</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Shows evidence of inviting, listening to and recognising the value of the contribution of other members of the AL Set in this process</li> </ul>	<i>5 marks</i>
<ul style="list-style-type: none"> <li>• Describes in detail how significant aspects of leadership performance have improved</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Shows evidence of having invited and made use of the critical review of members of the AL Set in identifying appropriate leadership behaviour</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Shows insight into the appropriateness of particular leadership behaviour and how and why this should change in other situations</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Uses models of leadership to analyse, make sense of and critically appraise particular behaviour</li> </ul>	<i>10 marks</i>
<ul style="list-style-type: none"> <li>• Actively invites feedback from members of the AL Set and others and uses this to reflect on and change leadership behaviour, as appropriate</li> </ul>	<i>10 marks</i>

At least 30 marks from a possible 60 marks are required in this Task in order to pass

**Task 2: Leadership Log - Assessment Criteria and Mark Sheet**

Candidates must demonstrate that they have effectively used their insight (developed though Unit S1) into their own/another's performance together with the learning outcomes from segment S2.2 to develop their own leadership performance. The following guidance is designed to help centres make objective and consistent judgements about whether or not the Leadership Log meets these requirements.

**This page must be used as a Mark Sheet and a copy retained for quality assurance purposes. A copy should also be used to provide candidate feedback**

Candidate

Name:

ELEMENTS OF THE LEADERSHIP LOG ASSESSMENT		ASSESSMENT CRITERIA	MARKS GAINED
1	Use your action learning set to establish, reflect on and review at least three personal learning objectives relating to own practice as a leader	<ul style="list-style-type: none"> <li>• <i>Demonstrates clear insight into own leadership abilities and implications for improvement</i></li> <li>• <i>Shows evidence of inviting, listening to and recognising the value of the contribution of other members of the AL Set in this process</i></li> </ul>	/5 /5
2	Demonstrate development of leadership skills and abilities through action learning, meeting the personal learning objectives	<ul style="list-style-type: none"> <li>• <i>Describes in detail how significant aspects of leadership performance have improved</i></li> <li>• <i>Shows evidence of having invited and made use of the critical review of members of the AL Set in identifying appropriate leadership behaviour</i></li> </ul>	/10 /10
3	Use your action learning set to reflect on your own and others' leadership qualities, skills and approaches and their effectiveness in different situations	<ul style="list-style-type: none"> <li>• <i>Shows insight into the appropriateness of particular leadership behaviour and how and why this should change in other situations</i></li> </ul>	/10
4	Through action learning, acquire and demonstrate an understanding of relevant leadership principles in the context of personal practice	<ul style="list-style-type: none"> <li>• <i>Uses models of leadership to analyse, make sense of and critically appraise particular behaviour</i></li> </ul>	/10
5	Modify your own leadership approach in response to feedback and evaluation from the members of the action learning set, and others, in order to improve effectiveness	<ul style="list-style-type: none"> <li>• <i>Actively invites feedback from members of the AL Set and others and uses this to reflect on and change leadership behaviour, as appropriate</i></li> </ul>	/10
<b>Assessor's comments</b>			
<b>Total marks achieved out of 60:</b>		<b>OUTCOME:</b> (CIRCLE AS APPROPRIATE) PASS (Min 30)                      UNSATISFACTORY	
<b>Assessor Initials and date</b>	<b>IQA initials and date</b>	<b>EV initials and date</b>	
	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	Outcome: Pass <input type="checkbox"/> Fail <input type="checkbox"/>	

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# Appendix Three

## Level 3 and Level 5 Awards and Certificates in Leadership

### Action Learning

## **ACTION LEARNING IN THEORY AND PRACTICE**

Action Learning is a technique used primarily in leadership and management development. It was developed by Professor Reg Revans and he himself emphasised that it was a very simple idea – that leaders and managers learn best by working together in a group (called an Action Learning Set) to help each other to find solutions to real work problems by discussion. They go off to attempt to make progress on their problems (by taking action, hence the name) and then meet again to discuss and review the outcomes of their actions. This not intended to be like a committee tackling each problem, but to help each individual to acquire a wider range of skills, understanding and models for action that can then be used and refined when dealing with future problems.

The way Revans expressed his model was through an equation:

$$L=P+Q$$

where:

L = Learning

P = Programmed (or expert-provided) knowledge

Q = Questioning

In other words, we learn best when our learning is driven by the power of inquiry (questioning) supported by access to the knowledge and experience of those who have come before us – accessed through learning resources and expert tutors. Underpinning this approach is the principle that learning should be focussed on finding solutions to real world problems, with the impetus for learning coming from the learner and the development of the learner being as important as finding a solution to the problem.

For the purposes of the ILM's leadership qualifications, the problem to be solved is the need to develop leadership skills, but this problem may present itself in the form of more specific problems to do with the particular weaknesses a candidate has identified as part of the programme or specific problems with people at work for which effective leadership is seen as being necessary (eg motivating people towards achieving the organisation's vision).

Action Learning takes time, usually several months to a year and ideally is supported by the employing organisation. For the purposes of the ILM Leadership qualifications, a minimum period of six months is set, and a maximum of one year, to emphasise the time needed to develop leadership skills and also the need to have a limit to the time devoted to the programme.

To learn more about Action Learning, you should read Reg Revans' own descriptions of the methodology in:

- Revans, R. W (1966) *The Theory of Practice in Management* London: Macdonald
- Revans, R.W. (1980) *Action Learning* London: Blond & Briggs,
- Revans, R.W. (1982) *The Origins and Growth of Action Learning* Bromley: Chartwell Bratt,
- Revans, R. W (1997) *Action Learning: Its Origins And Nature* in *Action Learning in Practice*, 3rd ed., edited by M.Pedler Brookfield: Gower

There is also an excellent review of the literature on Action Learning by Alan Mumford, published on the University of Sydney website at:

[http://www2.fhs.usyd.edu.au/arow/o/m07/Mumford\(1995\).htm](http://www2.fhs.usyd.edu.au/arow/o/m07/Mumford(1995).htm)

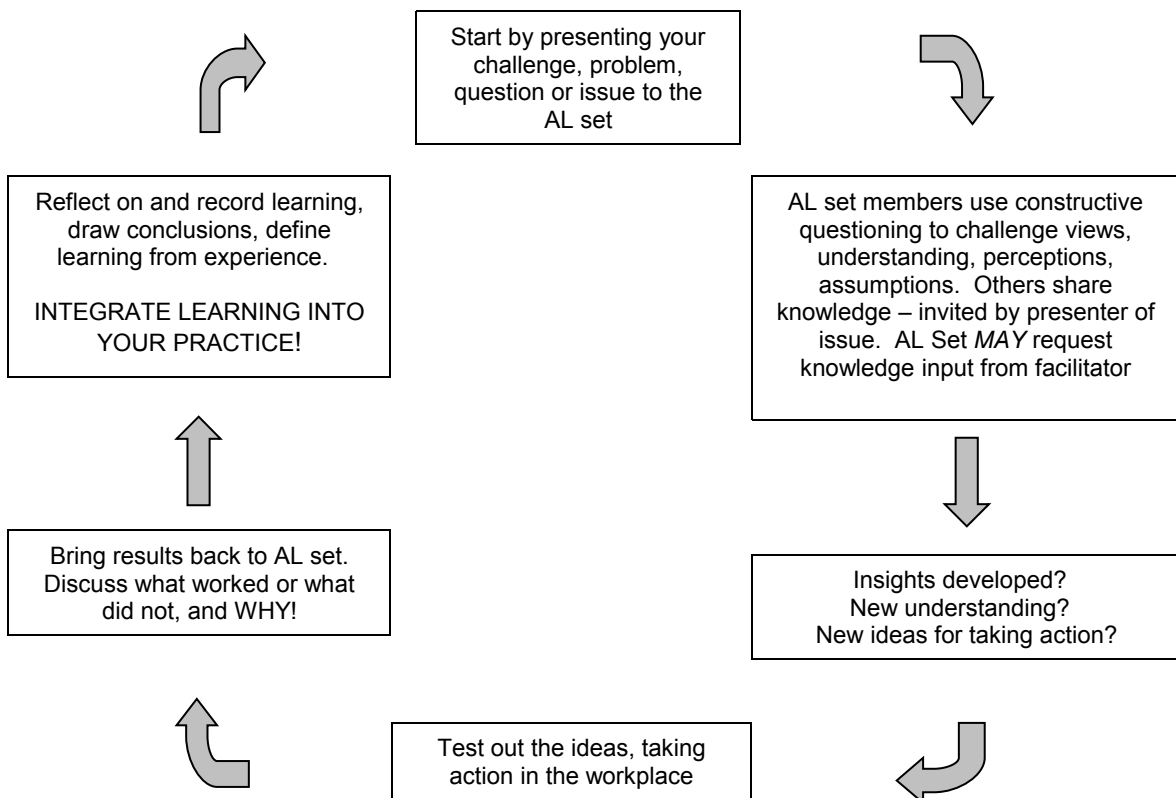
## ACTION LEARNING SETS

The Set is the group within which an individual engages with other learners to ask questions and explore solutions to problems. An AL Set should usually consist of between four and six people – the lower figure is an absolute minimum, the upper figure may be stretched to seven or an absolute maximum of eight if this is unavoidable. Outside this range an AL Set will not work effectively and therefore will not meet the requirements for using Action Learning on an ILM Leadership programme.

The first stage in forming a set is to explain its nature and purpose and to help the members get to know each other (ice-breaking activities focussed on individuals and their work roles can help here). Once formed, Sets should be allowed to develop their own working style. However, a few basic rules are important:

- Each individual should be allowed around 30 minutes at each meeting to have their problems addressed by the Set
- The Set is run by its members
- The Set Advisor (Tutor/Trainer) is not part of the Set and has no active role in the running of the Set. The Advisor is a source of Programme Knowledge (information and advice) if requested. (Alan Mumford quotes favourably the comment that ‘. . . the purpose is always for participants to learn. "So you often bite your lip." ’)

One important outcome of all Set meetings is the date of the next meeting, by which time members should have implemented the ideas agreed at the current meeting – this is one reason for an Advisor to intervene, if no meeting is agreed. The only other reasons are to prevent harm or other serious damage as a result of ill-informed decisions, or if there is such serious disagreement that the Set is failing. Simply making a bad or ill-informed decision that would have negative but not threatening outcomes is not a reason. Mistakes are part of learning.



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# Appendix Four

## Level 3 and Level 5 Awards and Certificates in Leadership

OCCUPATIONAL EXPERTISE  
and  
DELIVERY REQUIREMENTS

## **OCCUPATIONAL EXPERTISE**

To approve Centres to deliver the L3 and L5 Awards and Certificates in Leadership, the ILM will consider a centre's ability to meet various standards, not least having staff with sufficient competence.

Centre should normally be approved to offer at least the ILM Level 3 Certificate in First Line Management (to demonstrate appropriate competence in management development). Centres not approved to offer the appropriate management qualifications will need to demonstrate that they meet the Occupational Expertise standards for those qualifications.

In addition, individuals involved in delivering, assessing and quality assuring the L3 and L5 Awards and/or Certificates in Leadership should have some recent, practical experience in a leadership position, usually in the workplace, though similar experience in a part-time voluntary capacity would be acceptable. Staff should also have experience in facilitating action learning.

## **DELIVERY REQUIREMENTS**

Approval for these Leadership qualifications is dependent upon centres:

- meeting all requirements set out in these Programme Specifications and the individual Unit Specifications
- implementing action learning techniques for the delivery of Units L2 and S2.

# Appendix Five

## Level 3 and Level 5 Awards and Certificates in Leadership

Mapping to National Occupational Standards  
in Management and Leadership (2004)

## Level 3 Units

Unit L1		B6 Providing direction
L1.3.1	Explain the importance of organisations or projects having a vision and strategy	1 Create a vision of where your area is going and clearly and enthusiastically communicate it, together with supportive objectives and operational plans, to the people working within your area.
L1.3.2	Describe in basic terms how vision and strategy translate into team objectives	
L1.3.3	Explain the importance of the team having a common sense of purpose that supports the overall vision and strategy	
		2 Ensure that people working within your area understand and can see how the vision, objectives and operational plans link to the vision and objectives of the overall organisation.
L1.1.4	Explain the importance of a leader being able to adapt different leadership styles to different situations	3 Steer your area successfully through difficulties and challenges, including conflict within the area.
		4 Create and maintain a culture within your area which encourages and recognises creativity and innovation.
L1.1.1	Explain the basic characteristics of the leadership role	5 Develop a range of leadership styles and select and apply them to appropriate situations and people.
L1.1.2	Describe at least three different styles of leadership and their strengths and limitations	
L1.1.3	Explain how these leadership styles may be appropriate to different individuals, contexts and teams	
L1.3.4	Explain the key role that communication plays in establishing a common sense of purpose	6 Communicate regularly, making effective use of a range of different communication methods, with all the people working within your area and show that you listen to what they say.
L1.3.5	Describe and practice effective communication skills	
L1.4.3	Explain the importance of the leader supporting the team and its individual members and give practical examples of when this will be necessary	7 Give people in your area support and advice when they need it especially during periods of setback and change.
L1.4.1	Explain the importance of the leader being able to motivate teams and individuals and gain their commitment to objectives	8 Motivate and support people in your area to achieve their work and development objectives and provide recognition when they are successful.
L1.4.2	Describe the main motivational factors in a work context and how these may apply to different situations, teams and individuals	
		9 Empower people in your area to develop their own ways of working and take their own decisions within agreed boundaries.
L1.4.4	Explain the role that the leader plays in developing the team and its members	10 Encourage people to give a lead in their own areas of expertise and show willingness to follow this lead.
L1.4.5	Describe basic techniques for developing the team and its members.	
		11 Win, through your performance, the trust and support of people within your area for your leadership and get regular feedback on your performance.

Unit L1 + L2		A2 Managing self and personal skills
L1.2.3	Appreciate the importance of playing to their own strengths and displaying confidence and self-assurance	1 Evaluate, at appropriate intervals, the current and future requirements of your work-role taking account of the vision and objectives of your organisation.
L2.1.5	Understand how to recognise and confirm improvements in own leadership performance	
L1.2.1	Describe the importance of being aware of their own emotions and the impact that these have on themselves and on others in a work context	2 Consider your values and your career and personal goals and identify information which is relevant to your work role and professional development.
L1.2.4	Explain the importance and characteristics of self-leadership	
L2.1.4	Set realistic time scales for leadership development	3 Discuss and agree personal work objectives with those you report to and how you will measure progress.
L2.1.2	Identify and plan appropriate actions to develop their leadership capacity	4 Identify the learning styles which work best for you and ensure that you take these into account in identifying and undertaking development activities.
L2.1.1	Recognise own leadership strengths and limitations	5 Identify any gaps between the current and future requirements of your work-role and your current knowledge, understanding and skills.
L1.2.2	Recognise their own strengths and limitations in the leadership role and the importance of continuously developing themselves	
L2.1.3	Identify sources of help and support	6 Discuss and agree, with those you report to, a development plan to address any identified gaps in your current knowledge, understanding and skills and support your own career and personal goals.
L2.2.1	Explain the nature and benefits of action learning and its role in own leadership development	
L2.2.2	Explain the responsibilities of an individual within an action learning set or group	
L2.2.3	Use action learning to develop own and others' leadership performance	
		7 Undertake the activities identified in your development plan and evaluate their contribution to your performance.
		8 Review and update your personal work objectives and development plan in the light of performance, any development activities undertaken and any wider changes.
		9 Get regular and useful feedback on your performance from those who are in a good position to judge it and provide objective and valid feedback.
L2.2.4	Reflect on, critically analyse, and record own leadership performance improvement	10 Ensure that your performance consistently meets or goes beyond agreed requirements.

## Level 5 Units

Unit S1		B6 Providing direction
S1.3.1	Explain the importance of organisations or projects having a vision, goals and values and how these create a common sense of purpose	1 Create a vision of where your area is going and clearly and enthusiastically communicate it, together with supportive objectives and operational plans, to the people working within your area.
S1.3.2	Describe how to develop a vision, goals and values which are realistic and capable of inspiring others to achieve	
S1.3.5	Describe how to stimulate others to translate vision, goals and values into objectives and practical guides to action	
S1.1.5	Explain the importance of a leader being able to draw on a repertoire of leadership styles to take account of different strategic and operational challenges.	2 Ensure that people working within your area understand and can see how the vision, objectives and operational plans link to the vision and objectives of the overall organisation.
		3 Steer your area successfully through difficulties and challenges, including conflict within the area.
		4 Create and maintain a culture within your area which encourages and recognises creativity and innovation.
S1.1.1	Explain the key responsibilities of the leadership role	5 Develop a range of leadership styles and select and apply them to appropriate situations and people.
S1.1.2	Describe at least three different theories of leadership and the leadership styles that each of these illustrates	
S1.1.3	Evaluate at least four leadership styles and their application in the context of the learner's own organisation	
S1.1.4	Explain how these leadership styles may be appropriate to different situations and people	
S1.3.6	Explain the key role that communication, persuasion and negotiation play in establishing a common sense of purpose	6 Communicate regularly, making effective use of a range of different communication methods, with all the people working within your area and show that you listen to what they say.
S1.3.7	Evaluate the effectiveness of different communication, persuasion and negotiation skills in their own context	
S1.4.4	Explain the importance of the leader supporting others in achieving their goals and give practical examples of when this will be necessary	7 Give people in your area support and advice when they need it especially during periods of setback and change.
S1.4.5	Explain the role that the leader plays in developing others both directly and indirectly	
S1.4.6	Describe and evaluate different techniques for developing others to achieve their objectives.	
S1.4.1	Explain the importance of the leader being able to motivate others and gain their commitment to the vision and goals of significant projects or programmes of work	8 Motivate and support people in your area to achieve their work and development objectives and provide recognition when they are successful.
S1.4.2	Describe the complex interaction of motivational factors in a work context	
S1.4.3	Evaluate how these may apply to different situations and people in their own context	
S1.3.3	Describe the principles and importance of delegation and empowering others	9 Empower people in your area to develop their own ways of working and take their own decisions within agreed boundaries.
S1.3.4	Evaluate how the principles of delegation and empowerment may apply in their own context	
		10 Encourage people to give a lead in their own areas of expertise and show willingness to follow this lead.

S1.2.5	Describe the importance of social awareness and relationship management to the leader's role	11 Win, through your performance, the trust and support of people within your area for your leadership and get regular feedback on your performance.
S1.2.6	Explain the importance and characteristics of self-leadership	

Unit S1 + S2		A2 Managing self and personal skills
S1.2.1	Explain the concept of emotional intelligence and its importance to the leadership role	1 Evaluate, at appropriate intervals, the current and future requirements of your work-role taking account of the vision and objectives of your organisation.
S1.2.3	Recognise the importance of continuously developing themselves in the leadership role and develop plans and opportunities to do so	
S1.2.4	Appreciate the importance of playing to their own strengths and displaying confidence and self-assurance	2 Consider your values and your career and personal goals and identify information which is relevant to your work role and professional development.
S1.2.5	Describe the importance of social awareness and relationship management to the leader's role	
S1.2.6	Explain the importance and characteristics of self-leadership	
S2.1.4	Set, monitor and adjust realistic time scales for leadership development	3 Discuss and agree personal work objectives with those you report to and how you will measure progress.
S2.1.2	Identify, assess, select and plan appropriate actions to develop own leadership capacity	4 Identify the learning styles which work best for you and ensure that you take these into account in identifying and undertaking development activities.
S1.2.2	Evaluate their own characteristics as a leader and identify their own strengths and limitations in the leadership role	5 Identify any gaps between the current and future requirements of your work-role and your current knowledge, understanding and skills.
S2.1.1	Analyse own leadership strengths and limitations	
S2.1.3	Identify sources of help and support	6 Discuss and agree, with those you report to, a development plan to address any identified gaps in your current knowledge, understanding and skills and support your own career and personal goals.
S2.1.5	Identify and make judgements about improvements in own leadership performance	
S2.2.1	Evaluate action learning as a leadership development technique and its role in own leadership development	
S2.2.2	Explain the responsibilities of an individual within an action learning set and the dynamics of relationships within a set	
S2.2.3	Engage actively in action learning to develop own and others' leadership performance	
		7 Undertake the activities identified in your development plan and evaluate their contribution to your performance.
		8 Review and update your personal work objectives and development plan in the light of performance, any development activities undertaken and any wider changes.
		9 Get regular and useful feedback on your performance from those who are in a good position to judge it and provide objective and valid feedback.
S2.2.4	Reflect on, critically analyse, make insightful judgements about and record own leadership performance improvement	10 Ensure that your performance consistently meets or goes beyond agreed requirements.

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## Appendix Six

# Level 3 and Level 5 Awards and Certificates in Leadership

Leadership Resources from ILM

## **The Naked Leader** **David Taylor**

This is a distillation of David Taylor's ideas and inspirations – ideas which have made him a sought-after speaker on leadership and personal growth.

*The Naked Leader* strips away the mystery, hype and jargon, to reveal the single formula for assured success that is available to everyone.

*The Naked leader* shares the exact actions that create immediate and lasting change, and transformation. What to do, when to do it and exactly how to do it.

RRP £12.99

**ILM price £8.99 €13.00**

Paperback  
ISBN 1-84112-423-0

## **The Naked Leader Experience** **David Taylor**

With *The Naked Leader Experience* David Taylor releases you from doubt and the fear of failure as he helps you to fulfil your dreams and ambitions. Refreshingly free of jargon and hype, and packed with positive, practical advice, this invaluable guide will also show you how the three 'R's' can help you to:

RECLAIM your birthright and be the very best that you already are  
REIGNITE your relationships and truly connect with others  
REINVENT your organisation and unleash the awesome potential that lies within you and your team.

No matter what your age, experience, or the challenges you face, *The Naked Leader Experience* will serve to remind you that your future is in your hands.

RRP £7.99

**ILM price £6.50 €9.00**

Paperback  
ISBN 0-553-81647-0

## **A Manager's Guide to Leadership** **Pedler, Burgoyne and Boydell**

In *A Manager's Guide to Leadership*, the authors argue two key points:-

Good leadership is not just a question of possessing and developing the right skill set or aligning yourself with a guru's particular model, it is about how you respond to tough dilemmas and difficult challenges

Leadership does not belong to the business top hierarchy, everybody faces leadership challenges whoever they are within the organisation.

RRP £19.99

**ILM price £16.99 €25.00**

Paperback  
ISBN 0-07-710423-4

## **Giuliani – Leadership Rudolph W. Giuliani**

In *Leadership*, Giuliani describes vividly the horror of the twin-towers catastrophe, and explains how the rules of management he enforced as Mayor enabled him to gain control of the emergency. These are also the rules, Giuliani makes clear, that anyone in a leadership position – from the head of a large corporate to the owner of a corner shop – can use to inspire others and achieve concrete results.

RRP £8.99

**ILM price £6.50 €9.00**

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ISBN 0-7515-3333-5

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