

**MINISTRY OF EDUCATION**

**NATIONAL OCCUPATIONAL STANDARDS**

**FOR**

**BUSINESS MANAGER ASSISTANT**

**LEVEL 5**

**CODE: 0413 454A**

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**FOREWORD**

Provision of quality education and training is fundamental to the Government’s overall strategy for socio-economic development. Quality education and training contribute to achievement focused on Kenya’s development blueprint and sustainable development goals.

Reforms in the education and training sector are necessary for achievement of Kenya Vision 2030 and meeting the provisions the Constitution of Kenya. The education sector had to be aligned to the Constitution and this resulted in formulation of the Policy Framework for Reforming Education and Training (Sessional Paper No. 1 of 2019). A key feature of this policy is the change in the design and delivery of TVET training. This policy document requires that training in TVET be competency based, Occupational Standards development be industry led, certification be based on demonstration of competence and mode of delivery that allows for multiple entry and exit in TVET programs.

These reforms demand that Industry takes a leading role in Occupational Standards development to ensure the Occupational Standards addresses its competence needs. It is against this background that this Occupational Standards has been developed.

It is my conviction that this Occupational Standards will play a great role towards development of competent business manager for the business management sector’s growth and sustainable development.

These Occupational Standards will play a great role towards development of competent business manager for the business management sector’s growth and development

**PREFACE**

Kenya Vision 2030 aims to transform the country into a newly industrializing, middle-income country providing high quality life to all its citizens by the year 2030. Kenya intends to create a globally competitive and adaptive human resource base to meet requirements of a rapidly industrializing economy through life-long education and training. TVET has a responsibility of facilitating the process of inculcating knowledge, skills and worker behaviour necessary for catapulting the nation to a globally competitive country, hence the paradigm shift to embrace Competency Based Education and Training (CBET).

The Technical and Vocational Education and Training Act No. 29 of 2013 and the Sessional Paper No. 1 of 2019 on Reforming Education and Training in Kenya, emphasized the need toreform Occupational Standards development, assessment and certification. This called for a shift to CBET to address the mismatch between skills acquired through training and skills needed by industry as well as increase the global competitiveness of Kenyan labour force.

This Occupational Standards has been developed in adherence to the Kenya National Qualification Framework and CBETA standards and guidelines. The Occupational Standards is designed and organized into Units of Learning with Learning Outcomes; suggested delivery methods, training/learning resources and methods of assessing the trainee’s achievement. The Occupational Standards is competency-based and allows multiple entry and exit to the course.

I am grateful to the Council Members, Council Secretariat, TVET institutions, NSSC, expert workers and all those who participated in the development of this Occupational Standards.

**ACKNOWLEDGMENT**

This occupational standard has been designed for competency-based training and has independent units of learning which allow trainee flexibility in entry and exit. In developing the Occupational Standards, significant involvement and support was received from various organizations.

I recognize with appreciation the role of industry experts in business management sector in ensuring that competencies required by the industry are addressed in the Occupational Standards. I also thank the experienced trainers for their valuable input and all those who participated in the process of developing this Occupational Standards.

In addition, I thank Technical and Vocational Education Training Authority (TVETA) for providing guidance on the development of this Occupational Standards.

I am convinced that this Occupational Standards will go a long way in ensuring that professionals in the business management sector will acquire competencies that will enable them to perform their work more efficiently.

**ABBREVIATIONS**

CBET Competency Based Education and Training

CPU Central Processing Unit

ICT Information Communication Technology

SOPStandard Operating Procedure

SWOT Strength Weakness Opportunity Threat

TVET Technical and Vocational Education and Training

TVETA Technical and Vocational Education and Training Authority

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**KEY TO UNIT CODE**

**Sector / Industry**

**Sub Sector**

**Occupational Area**

**Version Control**

**Unit of Competence Number**

**ISCED level, Programme Orientation and Level of Completion**

xx

x

xxx

x

xx

x

**OCCUPATIONAL STANDARD OVERVIEW**

Business Manager Assistant occupational standard comprises of competencies required by a Business Manager Assistant to: apply work ethics and practices, apply financial accounting skills, perform sales activities, apply digital literacy, apply entrepreneurial skills, apply economics skills, perform purchasing activities, apply principles of commercial law, apply management skills, perform staffing activities, and perform administrative assistant duties.

**SUMMARY OF UNITS OF COMPETENCY**

**BASIC UNITS OF COMPETENCE**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| 0611 451 01A | Apply Digital Literacy |
| 0417 451 02A | Apply Work Ethics and Practices |
| 0413 451 03A | Apply Entrepreneurial Skills |

**COMMON UNIT OF COMPETENCE**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| 0411 451 04A | Apply Financial Skills |
| 0031 451 05A | Apply Business Communication |
| 0421 451 06A | Apply principles of commercial law |
| 0413 451 07A | Apply management skills |
| 0588 451 08A | Apply Business Mathematics And Statistics |
| 0311 451 09A | Apply Economics skills |

|  |  |
| --- | --- |
| **CORE UNITS OF COMPETENCY** | |
| 0413 451 11A | Perform purchasing skills. |
| 0413 451 12A | Perform sales activities. |
| 0413 451 13A | Perform staffing activities. |
| 0413 451 14A | Perform administrative assistant duties. |

# BASIC UNITS OF COMPETENCE

**APPLY DIGITAL LITERACY**

**UNIT CODE:** 0611 451 01A

**UNIT DESCRIPTION:**

This unit covers the competencies required to demonstrate digital literacy. It involves operating computer devices, solving tasks using the Office suite, accessing online/offline data and information, performing online communication and collaboration, applying cybersecurity skills and performing jobs online. It also involves applying job entry techniques.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements** | **Performance Criteria** |
|
| 1. Operate computer devices | * 1. C***omputer device*** usage is determined as per workplace requirements.   2. ***Computer hardware*** is identified according to job requirements.   3. ***Computer software*** is identified according to workplace requirements.   4. Computer devices are turned on or off as per the correct workplace procedure.   5. ***Mouse techniques*** are applied in solving tasks as per workplace requirements.   6. Keyboard techniques are applied in solving tasks as per workplace requirements.   7. Computer files and folders are created and managed as per workplace requirements.   8. ***Internet connection option***s are identified and applied in connecting computer devices to the Internet.   9. ***External devices*** are identified and connected to the computer devices as per the job requirement. |
| Solve tasks using Office suite | * 1. ***Word processing concepts*** are applied in solving workplace tasks as per job requirements.   2. Worksheet data is entered and prepared in accordance with work procedures.   3. Worksheet data is built and edited in accordance with workplace procedures.   4. ***Data manipulation*** on a worksheet is undertaken in accordance with work requirements.   5. Worksheets are saved and printed in accordance with job requirements.   6. ***Electronic presentation concepts*** are applied in solving workplace tasks as per job requirements. |
| 1. Manage data and information | * 1. Identify and define data and information accurately according to workplace guidelines. procedures.   2. Explain the importance and demonstrate workplace uses of data and information in various tasks*.*   3. Identify and categorize available internet services according to industry standards.   4. classify and document available communication services   5. Retrieve and validate information using approved internet tools and platforms according to workplace requirements |
| 1. Perform online communication and collaborations | * 1. Netiquette principles are observed as per work requirements.   2. Electronic mail communication is executed in accordance with workplace policy.   3. Digital content copyright and licenses are identified and applied according to workplace policies and regulatory requirements.   4. ***Online collaboration tools*** are applied in accordance with workplace policies and regulatory requirements. |
| 1. Apply cybersecurity skills | * 1. ***Data protection*** and ***privacy*** is classified in accordance with workplace policies and regulatory requirements.   2. ***Internet security threats*** are identified as per workplace policies and regulatory requirements.   3. Computer threats and crimes are detected in accordance to Information Management security guidelines   4. ***Cybersecurity control measures*** are applied in accordance with workplace policies and regulatory requirements. |
| 6. Perform online jobs | 1. ***Online job platforms*** are identified as per the job requirements. 2. Online accounts and profiles are created in accordance with the work requirements. 3. Online jobs are identified according to the bidder’s skillset. 4. Online digital identity is managed according to industry best practices. 5. Online job bidding is done as per the specific job requirements. 6. Online tasks are executed according to the job requirements. 7. Personal online payment account is managed in accordance with financial regulations. |
| 7. Apply job entry techniques | * 1. ***Job opportunities*** are sought based on competencies.   2. A winning resume/CV is developed as per job advertisement.   3. An application/cover letter is developed based on the job advertisement.   4. ***Certificates and testimonials*** are organized as per resume.   5. ***Interview skills*** are demonstrated as per job advertisement. |

**RANGE**

This section provides a work environment and conditions to which the performance criteria apply. It allows for a different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Computer devices may include but are not limited to: | * Desktops * Laptops * Smartphones * Tablets * Smartwatches |
| 1. Computer hardware may include but are not limited to: | * The System Unit E.g. Motherboard, CPU, casing, * Input Devices e.g. Pointing, keying, scanning, voice/speech recognition, direct data capture devices. * Output Devices e.g. hardcopy output and softcopy output * Storage Devices e.g. main memory e.g. RAM, secondary storage (Solid state devices, Hard Drives, CDs & DVDs, Memory cards, Flash drives * Computer Ports e.g. HDMI, DVI, VGA, USB type C etc. |
| 1. Computer software may include but are not limited to: | * System software e.g. Operating System (Windows, Macintosh, Linux, Android, iOS) * Application Software e.g. Word Processors, Spreadsheets, Presentations etc. * Utility Software e.g. Antivirus programs |
| 1. External devices may include but are not limited to: | * Printers * Projectors * Smart Boards * Speakers * External storage drives * Digital/Smart TVs |
| 1. Word processing concepts may include but are not limited to: | * Creating word documents * Editing word documents * Formatting word documents * Saving word documents * Printing word documents |
| 1. Mouse techniques may include but are not limited to: | * Clicking * Double-clicking * Right-clicking * Drag and drop |
| 1. Internet connection options may include but are not limited to: | * Mobile Networks/Data Plans * Wireless Hotspots * Cabled (Ethernet/Fiber) * Dial-Up * Satellite * ISDN (Integrated Services Digital Network) |
| 1. Data manipulation may include but are not limited to: | * Use of formulae * Use of functions * Sorting * Filtering * Visual representation using charts |
| 1. Electronic presentation concepts may include but are not limited to: | * Creating slides * Editing slides * Formatting slides * Applying slide effects and transitions * Creating and playing slideshows * Saving presentations * Printing slides and handouts |
| 1. Online collaboration tools may include but are not limited to: | * Online Storage * Online productivity applications * Online meetings, * Online learning environments, * Online calendars * Social networks |
| 1. Data protection and privacy may include but not limited to: | * Confidentiality of data/information * Integrity of data/information * Availability of data/information |
| 1. Internet security threats may include but not limited to: | * Malware attacks * Social engineering attacks * Software supply chain attacks * Advanced persistent threats (APT) * Distributed denial of service (DDoS) * Man-in-the-middle attack (MitM) * Password attacks * IoT Attacks * [Phishing Attacks](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#phishing-attacks) * [Ransomware](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#ransomware) |
| 1. Security threats control measures may include but not limited to: | * Counter measures against cyber terrorism * Physical Controls * Technical/Logical Controls * Operational Controls |
| 1. Online job platforms may include but are not limited to: | * Remotask * Data annotation.tech * Cloudworker * Upwork * Oneforma * Appen |
| 1. Job opportunities may include but not limited to: | * Self-employment * Service provision * product development * salaried employment |
| 1. Certificates and testimonialsmay include but not limited to: | * Academic credentials * Letters of previous employments/ services rendered * Letters of commendation * Certifications of participation * Awards |
| 1. Interview skills may include but not limited to: | * Listening skills * Grooming * Language command * Articulation of issues * Body language * Time management * Honesty * Generally knowledgeable in current affairs and technical area |

**REQUIRED KNOWLEDGE AND SKILLS**

This section describes the knowledge and skills required for this unit of competency.

**Required knowledge**

The individual needs to demonstrate knowledge of:

* Computer Hardware and Software Concepts
* Computer Security Concepts (Data security and privacy)
* Cyber security threats and control measures
* Understanding Computer Crimes
* Detection and protection against computer crimes
* Laws governing protection of ICT in Kenya
* Digital Identity Management
* Netiquette Principles
* Fundamentals of Copyright and Licenses
* Word processing;
* Functions and concepts of word processing;
* Documents and tables creation and manipulations;
* Document editing;
* Document formatting;
* Word processing utilities
* Spreadsheets;
* Meaning, types and importance of spreadsheets;
* Components of spreadsheets;
* Functions, formulae, and charts, uses and layout;
* Data formulation, manipulation and application to cells;
* Editing & formatting spreadsheets;
* Presentation Packages;
* Types of presentation Packages.
* Creating, formulating, running, editing, printing and presenting slides and handouts
* Networking and Internet;
* Internet connectivity.
* Browser and digital content management;
* Managing data, information, and digital content
* Electronic mail and World Wide Web
* Fundamentals of Online Working;
* Online Profile Management;
* e-Portfolio Management;
* Online Jobs Bidding;
* Online Payment Systems;
* Job entry techniques
* Job searching sites
* Interview preparation
* Interview handling

**Required skills**

The individual needs to demonstrate the following skills:

* Active listening
* Keyboard
* Mouse
* Analytical
* Creativity
* Interpretation
* Communication
* Spreadsheet operations (applying fundamental operations such as addition, subtraction, division and multiplication)
* Computer Use Safety
* Document Editing
* Document Formatting
* Document Printing
* Netiquette
* Internet Browsing
* Problem Solving
* Online Collaboration
* Cybersecurity
* CV writing
* Grooming

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge, and skills range.

|  |  |
| --- | --- |
| 1. Critical aspects of competency | ***Assessment requires evidence that the candidate:***   * 1. Operated computer devices as per workplace policies and regulations.   2. Manage data and information as per workplace policies and regulations.   3. Performed online communication and collaboration as per workplace policies and regulations.   4. Applied cybersecurity skills in accordance with workplace policies and regulations.   5. Executed online tasks according to the job requirements.   6. Searched for job opportunity based on competencies.   7. Prepared job requirement documentations based on job opportunity.   8. Demonstrated interview skills based on the job opportunity. |
| 1. Resource implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant work environments where assessment can take place.   3. Resources relevant to the proposed activities or task. |
| 1. Methods of assessment | Competency in this unit may be assessed through:   * 1. Observation   2. Oral assessment   3. Portfolio of evidence   4. Interviews   5. Third party report   6. Written assessment   7. Practical assessment   8. Projects |
| 1. Context of assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector and workplace job role is recommended. |

**APPLY WORK ETHICS AND PRACTICES**

**UNIT CODE:** 0417 451 02A

**UNIT DESCRIPTION**

This unit covers competencies required to effectively apply work ethics and practices. It involves the ability to: conduct self-management, promote ethical work practices and values, promote teamwork, manage workplace conflicts, maintain professional and personal development, apply problem-solving and promote customer care.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements** | **Performance Criteria** |
|
| 1. Apply self-management skills | * 1. Personal vision, mission and goals are formulated based on potential and concerning organization objectives and strategic plan   2. Self-esteem and a positive self-image are developed and maintained based on value   3. Emotional intelligence and stress management are demonstrated as per workplace requirements.   4. Assertiveness is developed and maintained based on the requirements of the job.   5. Accountability and responsibility for one's actions are demonstrated based on workplace instructions.   6. Time management, attendance and punctuality are observed as per the organization’s policy.   7. Personal goals are managed as per the organization’s objective   8. Self-strengths and weaknesses are identified based on personal objectives   9. Motivation, initiative and proactivity are utilized as per the organization policy   10. Individual performance is evaluated and monitored according to the agreed targets. |
| 1. Promote ethical work practices and values | * 1. Integrity is demonstrated as per acceptable norms   2. Codes of conduct is applied as per the workplace requirements   3. Policies and guidelines are observed as per the workplace requirements   4. Professionalism is exercised in line with organizational policies |
| 1. Promote Team work | * 1. ***Teams*** are formed to enhance productivity based on organization’s objectives   2. Duties are assigned to teams under the organization policy.   3. Team activities are managed and coordinated as per set objectives.   4. Team performance is evaluated based on set targets as per workplace policy.   5. ***Conflicts*** are resolved between team members in line with organization policy.   6. Gender and diversity-related issues are identified and mainstreamed in accordance with workplace policy.   7. Healthy ***relationships*** are developed and maintained in line with the workplace.   8. Adaptability and flexibility are applied in dealing with team members as per workplace policies |
| 1. Maintain professional and personal development | * 1. ***Personal growth and development*** needs are identified and assessed in line with the requirements of the job.   2. ***Training and career opportunities*** are identified and utilized based on job requirements.   3. ***Resources*** for training are mobilized and allocated based on organizations and individual skills needs.   4. Licenses and certifications relevant to the job and career are obtained and renewed as per policy.   5. Recognitions are sought as proof of career advancement in line with professional requirements.   6. Work priorities and personal commitments are balanced and managed based on the requirements of the job and personal objectives.   7. Dynamism and on-the-job learning are embraced in line with the organization’s goals and objectives. |
| 1. Apply Problem solving skills | * 1. ***Creative, innovative*** and practical solutions are developed based on the problem   2. Independence and initiative in identifying and solving problems are demonstrated based on the requirements of the job.   3. Team problems are solved as per the workplace guidelines   4. Problem-solving strategies are applied as per the workplace guidelines   5. Problems are analyzed and assumptions tested as per the context of data and circumstances |
| 1. Promote Customer Care | * 1. Customers' needs are identified based on their characteristics   2. Customer ***feedback*** is allowed and facilitated in line with organization policies.   3. Customer concerns and complaints are analyzed and resolved in line with the set organizational culture.   4. Proactive customer outreach programs are implemented as per organizational policies   5. Customer retention strategies are developed and implemented in line with the organizational policy |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Feedback may include but not limited to: | * Verbal * Written * Informal * Formal |
| 1. Conflicts include but are not limited to: | * Interpersonal Conflict. * Intrapersonal Conflict. * Intergroup Conflict. * Intragroup Conflict. |
| 1. Relationships may include but not limited to: | * Man/Woman * Trainer/trainee * Employee/employer * Client/service provider * Husband/wife * Boy/girl * Parent/child * Sibling relationships |
| 1. Team may include but not limited to: | * Small work group * Staff in a section/department * Inter-agency group * Virtual teams |
| 1. Personal growth may include but not limited to: | * Growth in the job * Career mobility * Gains and exposure the job gives * Net workings * Benefits that accrue to the individual as a result of noteworthy performance |
| 1. Personal objectives may include but not limited to: | * Long term * Short term * Broad * Specific |
| 1. Trainings and career opportunities may include but not limited to | * Participation in training programs * Serving as Resource Persons in conferences and workshops * Capacity building |
| 1. Resource may include may but not limited to: | * Human * Financial * Technology |
| 1. Creative and innovative may include but not limited to: | * New ideas * Original ideas * Different ideas * Methods/procedures * Processes * New tools |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Active listening
* Critical thinking
* Organizational
* Negotiation
* Monitoring
* Evaluation
* Problem solving
* Decision Making
* Leadership
* Creative/innovative thinking
* Adaptability
* Conflict management
* Emotional intelligence
* Teamwork

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Work values and ethics
* Company policies and procedures
* Company operations, procedures and standards
* Flexibility and adaptability
* Concept of time and leisure time
* Decision making
* Work planning
* Organizing work
* Monitoring and evaluation
* Record keeping
* Gender and diversity mainstreaming
* Drug and substance abuse
* Professional growth and development
* creativity
* Innovation
* problem solving
* customer care
* mentoring and coaching.
* Emerging issues

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment require evidence that the candidate:   * 1. Promoted ethical practices and values as per organizational procedures.   2. Promoted Teamwork as per workplace assignments.   3. Maintained professional and personal development as per organizational procedures.   4. Applied Problem-solving skills based on work requirements.   5. Identified customer needs based on their characteristics.   6. Gave back Customer feedback in line with organization policies. |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place. 3. Resources relevant to the proposed activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical assessment 2. Written tests 3. Third party reports 4. Oral questioning 5. Portfolio of evidence 6. Interview 7. Observation |
| 1. Context of Assessment | The competency may be assessed in a workplace or a simulated workplace |

**APPLY ENTREPRENEURIAL SKILLS**

**UNIT CODE : 0413 451 03A**

**UNIT DESCRIPTION**

This unit covers the competencies required to demonstrate an understanding of entrepreneurship. It involves demonstrating an understanding of financial literacy, applying entrepreneurial concepts identifying entrepreneurship opportunities, applying business legal aspects, developing business innovative strategies, and developing business plans.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements** | **Performance Criteria** |
|
| 1. Apply Financial Literacy | 1. **Sources of personal and business** ***funds*** are identified as per financial procedures and standards 2. Personal finances are managed as per financial procedures and standards 3. Savings are managed as per financial procedures and standards 4. Debts are managed as per financial procedures and standards 5. Investments are undertaken as per financial procedures and standards 6. Insurance services are procured as per financial procedures and standards |
| 2. Apply entrepreneurial concept | 1. Entrepreneurs and Business persons are distinguished as per principles of entrepreneurship 2. ***Types of entrepreneurs*** are identified as per principles of entrepreneurship 3. Ways of becoming an entrepreneur are identified as per principles of Entrepreneurship 4. ***Characteristics of Entrepreneurs*** are identified as per principles of Entrepreneurship 5. Salaried employment and self-employment are distinguished as per principles of entrepreneurship 6. ***Requirements for entry into self-employment are*** identified according to business procedures and standards 7. Roles of an Entrepreneur in an enterprise are determined according to business procedures and standards 8. Contributions of entrepreneurship to National development are identified as per business procedures and standards |
| 3. Identify entrepreneurial opportunities | 1. Business ideas are identified as per business procedures and standards 2. Factors to consider when evaluating business opportunity viability are explored based on business procedure and standards 3. Entrepreneurial opportunities are evaluated as per business procedures and standards 4. Business ideas and opportunities are generated as per business procedures and standards 5. Business life cycle is analysed as per business procedures and standards |
| 4. Apply business legal aspects | * 1. ***Forms of business ownership*** are identified as per legal procedures and practices   2. Business Registration and Licensing processes are identified as per legal procedures and practices   3. Types of Contracts and Agreements are analysed as per legal procedures and practices   4. Employment Laws are identified as per legal procedures and practices   5. Taxation laws are identified as per legal procedures and practices |
| 5. Innovate Business strategies | * 1. Business innovation strategies are determined by the organization standards   2. Creativity in business development is demonstrated in accordance with business standards   3. ***Innovative business standards*** are developed as per business principles   4. Linkages with other entrepreneurs are created as per best practice   5. ICT is incorporated in business growth and development as per best practice |
| 6. Develop Business Plan | 1. Business idea is described as per business procedures and standards 2. Business description is developed as per business plan format 3. Marketing plan is developed as per business plan format 4. Organizational/Management plan is prepared in accordance with business plan format 5. Production/operation plan is prepared in accordance with business plan format 6. Financial plan is prepared in accordance with the business plan format 7. Executive summary is prepared in accordance with business plan format 8. Business plan is presented as per best practice 9. Business ideas are incubated as per institutional policy. |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Sources of personal funds mayinclude but not limited to: | * Salary/Wages * Investments * Savings * Inheritance * Government Benefits |
| 1. Sources of business finance mayinclude but not limited to: | * Equity Financing * Debt Financing, * Personal Savings/Investment * Retained Earnings * Grants and Subsidies * Crowdfunding * supplier Credit: * Leasing and Asset Financing: |
| 1. Types of entrepreneurs may include but not limited to: | * Innovators * Imitators * Craft * Opportunistic * Speculators |
| 1. Characteristics of Entrepreneurs may include but not limited to: | * Creative * Innovative * Planner * Risk taker * Networker * Confident * Flexible * Persistent * Patient * Independent * Future oriented * Goal oriented |
| 1. Requirements for entry into self-employment may include but not limited to | * Technical skills * Management skills * Entrepreneurial skills * Resources * Infrastructure |
| 1. Forms of businesses ownership may include but not limited to: | * Sole proprietorship * Partnership * Limited companies * Cooperatives |
| 1. Innovative business standards may include but not limited to: | * New products * New methods of production * New markets * New sources of supplies * Change in industrialization |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Analytical
* Management
* Problem-solving
* Root-cause analysis
* Communication

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Decision making
* Business communication
* Change management
* Competition
* Risk
* Net working
* Time management
* Leadership
* Factors affecting entrepreneurship development
* Principles of Entrepreneurship
* Features and benefits of common operational practices, e. g., continuous improvement (kaizen), waste elimination,
* Conflict resolution
* Health, safety and environment (HSE) principles and requirements
* Customer care standards
* Basic financial management
* Government Business strategic planning
* Impact of change on individuals, groups and industries
* and regulatory processes
* Local and international market trends
* Product promotion standards
* Market and feasibility studies
* Government and regulatory processes
* Local and international business environment
* Relevant developments in other industries
* Regional/ County business expansion standards

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Identified Sources of personal and business finance as per financial procedures and standards 2. Managed Personal finances as per financial procedures and standards 3. Made Investment decisions as per financial procedures and standards 4. GeneratedBusiness ideas and opportunities based on business procedure and standards 5. Analysed business life cycle based on business procedure and standards 6. Determined business innovative standards as per business principles 7. Developed and presented a business plan as per regulatory framework. |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   1. Written tests 2. Oral questions 3. Third party report 4. Interviews 5. Portfolio |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# COMMON UNIT OF COMPETENCE

**APPLY FINANCIAL ACCOUNTING SKILLS**

**UNIT CODE: 0411 451 04A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply financial accounting skills. It involves applying accounting concepts, conventions and policies, preparing books of original entries, posting transactions to the ledger, preparing cash books, correcting accounting errors, preparing bank reconciliation statements, maintaining non-current assets register, maintaining receivables and payables ledgers and preparing sole trader statements.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
|
| 1. Apply accounting concepts, conventions and policies | * 1. ***Accounting concepts, conventions and policies*** are applied as per accounting standards.   2. Accounting equation is drawn as per the double entry concept and accounting principles   3. Users of accounting information are identified according to the business entity |
| 1. Prepare books of original entries | * 1. Transactions are classified based on type of transaction   2. Source documents are identified in line with transactions   3. Books of original entries are identified based on purpose   4. Source documents are recorded in the books of original entries based on transaction type |
| 1. Post transaction to the ledger | * 1. Ledgers are classified based on transaction types   2. Ledger accounts are identified as per types of ledgers   3. Transactions are posted to ledger accounts as per accounting guidelines   4. Ledger accounts are balanced as per accounting guidelines   5. Trial balance is extracted from ledger accounts as per accounting guidelines |
| 1. Prepare cash books | * 1. ***Cash books*** are identified according to their columns   2. Cash receipts are classified as either incoming or outgoing as per accounting principles   3. Cash receipts are recorded in line with their classification.   4. Cash discounts are recorded as per accounting guidelines |
| 1. Correct accounting errors | * 1. Errors that affect the agreement of the trial balance are identified as per GAAPs   2. Errors that do not affect the agreement of trial balance are identified following GAAPs   3. Errors are corrected on the basis of double entry rules   4. Suspense balance is eliminated based on errors corrected.   5. Reported gross/net profit is corrected on the basis of corrected errors.   6. Statement of financial position is corrected on basis of corrected errors. |
| 1. Prepare bank reconciliation statements | * 1. Cash book and bank statement balance discrepancies are identified as per the accounting principles   2. Cash book (bank column) balance is updated as per accounting guidelines   3. Bank Reconciliation statement is prepared as per accounting guidelines |
| 1. Maintain non-current assets’ register | * 1. Costs of assets are determined as per ***accounting standards***   2. Depreciation is computed as per organization procedures on valuation of non-current assets   3. Depreciation is recorded as per ***accounting guidelines***   4. Purchase of non-current assets are recorded in line with accounting guidelines   7.5 Disposals are recorded as per accounting guideline   * 1. Asset balances are determined as per accounting guidelines |
| 1. Maintain receivables and payables ledgers | * 1. Bad debts are identified and written off as per organization policies   2. Allowances (provisions) are created in line with the prudence concept   3. Receivables balance is adjusted as per written off debts and the allowances (provisions) created   4. Payables balance is adjusted as per GAAPs   5. Control accounts are prepared as per GAAPs |
| 1. Prepare sole trader statements | * 1. Income and expense balances are identified as per entity’s trial balance   2. Year- end adjustments are made on the balances as per accounting guidelines   3. Statement of profit or loss is prepared based on adjusted balances.   9.4 Asset, liability and capital balances are identified as per the entity’s trial balance   * 1. Year-end adjustments are made in the balances as per accounting guidelines.   2. Statement of financial position is prepared based on adjusted balances |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |  |
| --- | --- | --- |
| **Variables** | **Range** | |
| 1. Accounting concepts, conventions and policies may include but are not limited to: | | * Going concern * Accrual * Prudence * Matching |
| 1. Cashbooks include but are not limited to: | | * Two column cashbook * Three column cashbook * Petty cashbook |
| 1. Accounting Standards include but are not limited to: | | * Kenya Accounting Standards (KAS) * International Accounting Standards (IAS) * International Financial Reporting Standards (IFRS) |
| 1. Accounting guidelines: | | * Accounting standards * Accounting concepts/conventions/bases |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs the following skills:

* Numeracy
* Analytical
* Computational
* Recording with accuracy and precision

**Required knowledge**

The individual needs knowledge of:

* Principles of bookkeeping
* Basic accounting principles/concepts

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| * + - 1. Critical Aspects of Competency | **Assessment requires evidence that the candidate:**   1. Recorded source documents in the books of original entry as per accounting standards 2. Posted transaction to ledger accounts as per accounting standards 3. Recorded cash receipts in the cash book as per accounting standards 4. Corrected accounting errors as per accounting standards 5. Prepared Bank Reconciliation statement as per accounting standards 6. Recorded depreciation as per accounting standards 7. recorded purchase of non-current assets as per accounting standards 8. Prepared control accounts as per accounting standards |
| * + - 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. POE evaluation 4. Third party reports 5. Written tests |
| * + - 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| * + - 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY BUSINESS COMMUNICATION**

**UNIT CODE:** 0013 451 05A

**UNIT DESCRIPTION**

This unit specifies the competencies required to undertake business communication. It involves administering communication channels, implementing types of communication, implementing service charter, safeguarding confidentiality of information, coordinating communication on social media platforms, preparing workplace meeting and reports.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| --- | --- |
| 1. Administer Communication channels | * 1. Communication processes are handled in line with the human resource manual on correspondence.   2. Principles of effective communication are applied as per the organisation policy   3. Channels of communication are administered as per the organisation policy   4. Factors to effective communication are selected in line with SOPs   5. Barriers to effective communication are identified in line with as per the organisation policy   6. Patterns of communication are identified as per the organization policy   7. Sources of Information are identified as per the organisation policy   8. Organization Policies are identified and applied in line with as per the organisation policy   9. Records are kept in line with the human resource manual on correspondence and as per the organisation policy |
| 1. Implement types of communication | * 1. Familiarize with organization record management policies where available.   2. Record management policies are initiated as per the organization procedures.   3. Records are sorted and classified in lines with the organization policy.   4. Records are indexed in line with the organization policy.   5. Records are stored in line with the organization policy.   6. Records back-up is created in line with as per the organization policy.   7. Records are appraised and obsolete records are disposed in line with the organization policy . |
| 1. Implement service charter | * 1. Familiarize with the organization service charter.   2. Emphases the Importance of service charter in line with the organisation policy.   3. Response to correspondences is done in line with the service charter.   4. Record retrieval is done in line with service charter. |
| 1. Safeguard confidentiality of information | * 1. Familiarize with the organization policy on confidentiality of information.   2. ***Physical securing*** of records and correspondences is done in line with organization policy   3. Monitor how records and correspondences in circulation are handled within the organization.   4. Information issecured as per the organisation policy of the Organisation   5. Sensitize employees onsafeguarding confidentialityof information and records as per the organization policy   6. Regular tracing of records and correspondences is done in line with the organization policy. |
| 1. Coordinate communication on social media platforms | * 1. Organization social media requirements are identified as per the organisation policy   2. Initiate development and review of social media policies and procedures in line with organisational objectives   3. Select the social media platforms that meet the needs of the organization.   4. Source for content, both internal and external, for use on social media platforms are handled as per the organisation policy   5. Respond to customers in timely manner directing them to relevant information as required according to social media policies and procedures.   6. Update of the social media account to maximize effectiveness as per the organisation policy   7. Enforce adherence to legal and ethical practices as per the organization policy.   8. Track social media activities using ***social media monitoring tools.***   9. Report the social media engagements to management for implementation in line with organisation policy |
| 1. Prepare work place meetings | * 1. Minute taking is defined as per the organization policy   2. Types of meetings are highlighted as per the organization policy   3. ***Structure of meetings*** are identified as per the organization policy |
| 1. Prepare workplace report | * 1. Report writing is defined as per the organization policy.   2. Importance of reports in human resource function is emphasized as per the organization policy.   3. Forms and types of reports are described as per the organization policy   4. Reports formats are identified as per the organization policy   5. Reports preparation is done as per the organization policy. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

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| --- | --- |
| **Variable** | **Range** |
| 1. Physical securing may include but not limited to: | * + Lock and key   + Reinforced storage   + Fireproofing   + Lockable cabinets   + Restricted access |
| 1. Social media monitoring tools may include but not limited to: | * + Twitter counter   + Hootsuite   + Klout   + Buzzlogix   + Digimind |
| 1. Structure of meetings may include but not limited to: | * + Notice   + Agenda   + Preparation of other relevant documents   + Minute formats |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Data analysis and presentation
* Listening
* Organizational
* Leadership
* Time management
* Conflict management and resolutions
* Budgeting
* Decision making
* Emotional intelligence
* Interpersonal Relations
* Crisis management
* Analytical skills
* Data analysis and presentation
* Public relations
* Negotiation
* Computer
* SOP
* Operations of the organization
* Emerging issues.
* Record management
* Reading

**Required Knowledge**

The individual needs to demonstrate knowledge and understanding of:

* Work place procedures
* Human resource procedures and manuals
* Record Management function
* Work Planning and documentation
* Dispute resolution process
* Legislations, policies and regulations
* Communication processes
* Negotiations
* Interpersonal relations
* ICT
* Emotional intelligence
* Social media use

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of  Competency | Assessment requires evidences that the candidate:   * 1. Handled organizational policies as per the organisation policy   2. Sorted correspondence and took necessary action as per the organisation policy   3. Maintain human resource records as per the organisation policy   4. Align response time to service charter as per the organisation policy   5. Safeguarded confidentiality of information as per the organisation policy   6. Legal and Ethical Issues in social media platforms as per the organisation policy   7. Managed communication on social media platforms as per the organisation policy   8. Prepared work place meetings as per the organisation policy   9. Prepared work place reports as per the organisation policy |
| 2. Resource Implications for competence certification | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 3. Method of assessment | Competency may be assessed through:   * 1. Written questions   2. Projects   3. Review of portfolios   4. Review of third-party workplace reports |
| 4. Context for assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 5. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY PRINCIPLES OF COMMERCIAL LAW**

**UNIT CODE:** **0421 451 06A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply principles of commercial law; It involves applying nature of law, illustrating the structure of court system in Kenya, applying law of tort, law of contract, law of agency, law of sale of goods, hire purchase contracts, law of negotiable instruments, law of insurance and law of property.

**ELEMENTS AND PERFORMANCE CRITERIA**

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| --- | --- |
| **Elements** | **Performance Criteria** |
|
| 1.  Apply nature of law | 1.1 Nature of law is determined as per common law.  1.2 The purpose of law is identified as per common law  1.3 ***Sources of law*** *in Kenya* are identified as per Judicature Act  1.4 Law is classified as per Kenyan law. |
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| 2.  Illustrate the structure of court system in Kenya | 2.1 Court structure is determined as per the constitution of Kenya, 2010  2.2 Composition of ***Kenyan courts*** is determined as per the constitution of Kenya, 2010  2.3 Jurisdiction of courts is determined as per the constitution of Kenya, 2010 |
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| 3.  Apply law of Tort | 3.1 Nature of tortuous liability is explained as per the law of tort  3.2 Tort, crime and breach of contract are differentiated as per the law of tort  3.3 Capacity to sue/sued is determined as per the law of tort  3.4 ***Types of torts*** are identified as per law of torts  3.5 General defenses in tort are identified as per the law of tort |
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| 4.  Apply law of Contract | 4.1 Essentials of a valid contract are identified as per law of contract  4.2 Types of contracts are determined as per law of contract  4.3 Methods of discharging contract are identified as per law of contract  4.4 Remedies of breach of contract are determined as per law of contract |
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| 5.  Apply law of Agency | 5.1 Agents are classified as per law of agency  5.2 Agents’ authority is established as per law of agency  5.3 Duties of agents are identified as per law of agency  5.4 Rights of agents are identified as per law of agency  5.5 Methods of terminating agency are determined as per law of agency |
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| 6.  Apply law of sale of goods | 6.1 Sale and agreement to sell are differentiated as per sale of goods Act 2015  6.2 Capacity to buy and sell is determined as per sale of goods Act 2015  6.3 ***Terms of sale of goods*** are determined as per sale of goods Act 2015  6.4 Doctrine of caveat emptor is determined as per sale of goods Act 2015  6.5 Factors affecting transfer of title are determined as per sale of goods Act 2015  6.6 Rights of parties are identified as per sale of goods Act 2015  6.7 Auction process is determined as per sale of goods Act 2015 |
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| 7.  Apply hire purchase contracts | 7.1 Nature of hire purchase agreement is determined as per hire purchase Act 2017  7.2 Hire purchase agreement is registered as per hire purchase Act 2017  7.3 Conditions of terminating hire purchase agreement are determined as per hire purchase Act 2017  7.4 Completion of hire purchase agreement is determined as per hire purchase Act 2017 |
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| 8.  Apply law of negotiable instruments | 8.1 ***Negotiable instruments*** are identified as per negotiable instrument Act 2018  8.2 Characteristics of negotiable instruments are identified as per negotiable instrument Act 2018  8.3 Negotiable instruments are distinguished as per negotiable instrument Act 2018 |
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|  |
| 9.  Apply law of insurance | 9.1 Insurance contracts are identified as per insurance Act 2020 laws of Kenya  9.2 ***Insurance principles*** are analyzed based on insurance Act 2020 laws of Kenya  9.3 Insurance contracts are formed as per organizational requirements  9.4 Insurance contracts are discharged as per contracts terms |
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| 10.  Apply law of property | 10.1 ***Property*** is classified based on property Act 2020  10.2 Land interests are determined as per organizational requirements  10.3 ***Intellectual property*** is determined as per Constitution of Kenya 2010 |
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**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

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| --- | --- |
| **Variables** | **Range** |
| 1. Sources of law in Kenya include but not limited to: | * + Constitution   + Legislation (Acts of parliament)   + Judicial precedent   + County assembly legislations   + Statutes of general application   + Common law   + Equity   Islamic law |
| 1. Kenyan courts include but not limited to: | * + Supreme Court   + Court of Appeal   + High Court   + Employment and Labour Relations Court   + Environment and Land Court   + Magistrates Court   + Court Martial   + Kadhis’ Court |
| 1. Types of torts include but not limited to: | * + Negligence   + Defamation   + Nuisance   + Trespass |
| 1. Terms of sale of goods may include but not limited to: | * + Conditions   + Warranties |
| 1. Negotiable instrument may include but not limited to: | * + Cheques   + Bill of exchange   + Promissory note |
| 1. Insurance principles may include but not limited to: | * + Subrogation   + Indemnity   + Insurable interest   + Utmost good faith etc. |
| 1. Property may include but not limited to: | * + Real and personal   + Movable   + immovable   + tangible   + And intangible |
| 1. Intellectual property may include but not limited to: | * + Patents   + trademarks,   + Copyrights   + Industrial designs |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs knowledge of:

* Business & Economic cycles in a diverse range of sectors.
* Financial transactions
* Risk management.
* Contract management
* Civil wrongs

**SKILLS**

The individual needs the following skills:

* Evaluation
* Communication
* Analysis
* Numeracy
* Report writing
* Negotiation
* Inter-personal

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified sources of law in Kenya as per Judicature Act   2. Classified law as per Kenyan law.   3. Determined court structure as per the Constitution of Kenya, 2010   4. Determined jurisdiction of courts as per the Constitution of Kenya, 2010   5. Identified types of torts as per Law of Torts   6. Identified general defenses in tort as per the Law of Tort   7. Identified essentials of a valid contract as per the Law of Contract   8. Identified methods of discharging contract are identified as per the Law of Contract   9. Determined remedies of breach of contract as per the Law of Contract   10. Established agents’ authority as per the Law of Agency   11. Identified duties of agents as per Law of Agency   12. Identified rights of agents as per law of Agency   13. Determined methods of terminating agency as per Law of Agency   14. Determined terms of sale of goods as per Sale of Goods Act, 2015   15. Determined doctrine of caveat emptor as per Sale of Goods Act, 2015   16. Identified rights of parties as per Sale of Goods Act, 2015   17. Determined nature of hire purchase agreement as per Hire Purchase Act, 2017   18. Determined conditions of terminating hire purchase agreement as per Hire Purchase Act, 2017   19. Identified insurance contracts as per Insurance Act 2020, Laws of Kenya   20. Analyzed insurance principles based on Insurance Act 2020, Laws of Kenya   21. Determined intellectual property as per the Constitution of Kenya, 2010 |
| 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated 2. Environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. POE evaluation 4. Third party reports 5. Written tests |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY MANAGEMENT SKILLS**

**UNIT CODE: 0413 451 07A**

**UNIT DESCRIPTION**

This unit describes competencies required to effectively apply management principles in the workplace. It covers applying planning principles, organizing principles, directing principles and coordinating principles.

**ELEMENTS AND PERFORMANCE CRITERIA**

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| --- | --- |
| **ELEMENTS** | **PERFORMANCE CRITERIA** |
|
| Apply planning principle | * 1. Organizational ***goals and objectives*** are identified as per work procedure   2. ***Work plans*** are laid down based on work requirements   3. Monitoring of work progress is carried out based on planning factors   4. ***Planning principles*** are implemented based on work requirements |
| 1. Apply Organizing principle | * 1. Office goals and objectives are defined as per organizational procedure   2. Office tasks and responsibilities are assigned based on work requirements   3. Monitoring of progress is carried out as per organizational procedure |
| 1. Apply directing   principle | * 1. Orders and instructions are laid out to subordinates as per organizational procedure   2. Supervision of office staff is   carried out as per work requirement   * 1. Exchange of opinions and   ideas is carried out as per organization needs |
| 1. Apply coordinating principle | 1. Work schedules are created as per organizational procedure 2. Individual roles are defined as per work requirements 3. Teams are rewarded as per organizational procedure |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| Variables | Range |
| Goals and objectives may include but not limited to: | May include but not limited to:   * Innovation and adaptability * Customer satisfaction * Employee engagement and development * Achieve sustainable growth * Ensure financial growth and profitability * Identify opportunities for growth and diversification |
| 1. Work plans may include but are not limited to: | * Creating timelines * Break down the project into specific tasks * Identifying resources required * Identifying potential risks and challenges * Process for seeking approvals |
| 1. Planning principlesmay include but are not limited to: | * Vision and mission * Data-driven decision making * Flexible plans * Transparency in decision making * Fair and equitable decision making |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Knowledge**

The individual needs to demonstrate the following knowledge of:

* Principles of management
* Research
* Financial Accounting
* Commercial Law

**Required Skills**

The individual needs to demonstrate skills of:

* Communication
* Analytical
* Evaluation
* Management
* Problem solving
* Time management
* Data collection
* Numeracy
* ICT
* Entrepreneurship
* Occupational health and safety
* Environmental literacy

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| * + - 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Laid down work plans based on the requirements   2. Carried out monitoring of progress as per organizational   procedure   * 1. Carried out supervision of office staff as per work requirement   2. Created work schedules as per organizational procedure |
| * + - 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can   take place.   * 1. Access to relevant assessment environment.   2. Resources relevant to the proposed assessment activity or tasks. |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Portfolio of evidence 3. Third party reports 4. Projects 5. Written assessment 6. Oral assessment |
| * + - 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment. |
| * + - 1. Guidance Information for Assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY BUSINESS MATHEMATICS AND STATISTICS**

**UNIT CODE**: **0588 451 08A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply business mathematics and statistics to solve business problems. It involves applying statistical equations, applying statistical matrices, working out commercial mathematics, carrying out elementary statistics, carrying out descriptive statistics, applying set theory, applying basic probability theory and using index numbers.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| 1. Apply statistical equations | 1. Linear equations are determined as per the objective functions 2. Quadratic equations are determined as per the objective functions 3. Simultaneous equations are formulated as per the objective functions 4. Break-even analysis is computed as per the organization objective. 5. Differentiation and integration is carried out as per the objective functions 6. Total revenue, total cost and profit equations are formulated as per the organizational objectives. |
| 1. Apply statistical matrices | 1. Addition, subtraction, division and multiplication formulae are performed as per the order of operations. 2. Determinants of 2x2 matrices are calculated as per the order of operations. 3. Inverses of 2x2 matrices are calculated as per the order of operations 4. Matrices are applied to business operations as per the organizational objectives. |
| 1. Work-out commercial mathematics | 1. ***Discounts*** are computed as per organization’s policy 2. Commissionsare determined based on the company policies and procedures. 3. ***Methods of calculating wages*** are determined 4. Wages and salaries are computed as per organization policies. 5. Simple and compound interests are calculated as per the organization’s policy 6. Profit margin and mark-up are computed based on organization’s policy 7. Gross pay and net pay are calculated as per organization’s policy 8. Depreciation and appreciation of assets are worked-out as per the accounting guidelines. 9. Hire purchase price is determined as per the hire purchase agreement 10. Foreign exchange transactions are computed as per trade agreements. |
| 1. Carry out elementary statistics | 1. ***Methods of data collection*** are identified as per the organisation’s objectives 2. Sampling techniques and presentation of data is carried out as per the organisation’s objectives. 3. Data is presented using ***Tables and diagrams*** as per the functions Data is presented using ***Graphs*** as per the function 4. Cumulative frequency curve (OGIVE) are drawn and applied. |
| 1. Carry out descriptive statistics | 1. ***Measures of central tendency*** are determined according to Work procedures. 2. ***Measures of dispersion*** are determined on the basis of Work procedures 3. Measures of skewness and kurtosis are analyzed as per the Work procedures. |
| 1. Apply set theory | 1. Sets types are identified following the set theory. 2. Sets operations are performed as per the set theory. 3. Venn diagrams are drawn according to the set theory.. 4. Business problems are solved using set theory. |
| 1. Apply basic probability theory | 1. Probability events are identified as per the work place requirements. 2. Types of events are determined as per the work place requirements.. 3. Rules of probability are applied based on additive and multiplicative rules. 4. Bayes’ Theorem is applied as per the theorem rules 5. Probability trees are drawn according to events. 6. Solve business problems using probability |
| 1. Use index numbers | * 1. ***Index numbers*** are computed as per the formula   2. Methods of determining index numbers are applied as per the Work procedures.   3. Consumer Price Index (CPI) is calculated following the formula   4. Weighted index numbers are computed as per the formula |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| Variable | Range |
| 1. ***Discounts*** may include but not limited to: | * Cash discount * Trade discount * Quantity discount |
| 1. ***Methods of data collection*** may include but not limited to: | * Primary * Secondary Data |
| 1. ***Tables and diagrams*** may include but not limited to: | * Frequency distribution table * Bar charts * Pie charts * Histogram * frequency polygons |
| 1. ***Graphs*** may include but not limited to: | * Basic time series graphs * Z-charts * Lorenz curves and * Semi-log graphs |
| 1. ***Methods of calculating wages*** may include but not limited to: | * Piece rate * Hourly rate |
| 1. ***Measures of central tendency*** may include but not limited to: | * Mean: arithmetic mean, weighted arithmetic mean, geometric mean and harmonic mean * Mode * Median |
| 1. ***Measures of dispersion*** may include but not limited to: | * Range * Standard deviation * Variance * Co-efficient of variation * Quartile deviation |
| 1. ***Index numbers*** may include but not limited to: | * Laspeyre’s * Paasche’s * Fisher’s ideal * Marshal |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs the following skills:

* Numeracy
* Analytical
* Decision making
* Problem solving
* Critical thinking

**Required knowledge**

The individual needs the knowledge of:

* Data collection, presentation and analysis
* Business calculations

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| * + - 1. Critical Aspects of Competency | ***Assessment requires evidence that the candidate is able to:***   1. Formulate Simultaneous equations as per the objective functions 2. Compute break-even analysis as per the organization objective. 3. Formulate total revenue, total cost and profit equations as per the organizational objectives 4. Apply statistical matrices as per the organizational objectives. 5. Compute profit margin and mark-up based on organization’s policy 6. Compute simple and compound interests as per the organization’s policy 7. Present data using tables and diagrams as per the functions Data is presented using Graphs as per the function 8. Present data using graphs as per the functions Data is presented using Graphs as per the function 9. Determine measures of dispersion on the basis of Work procedures 10. Determine measures of central tendency according to Work procedures. 11. Solve business problems using Set theory according to the set theory. 12. Solve business problems using probability according to events. |
| * + - 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 Poe evaluation  3.4 Third party reports  3.5 Written tests |
| * + - 1. Context of Assessment | 4.1 The competency may be assessed in a workplace or a simulated workplace |
| * + - 1. Guidance information for assessment | 5.1 Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY ECONOMICS SKILLS**

**UNIT CODE: 0311 451 09A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply economic skills. It involves applying fundamentals of economic concepts, demand and supply in market analysis, consumer behavior theory, production theory, cost theory, understanding market structures, inflation and unemployment, money and banking, National income and international trade.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function**.** | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
|
| 1. Apply fundamental economic concepts. | 1. ***Economic concepts*** are identified as per the organizational requirements. 2. Economic methodology is selected as per organizational requirements. 3. Scope of economic resources are determined as per organizational requirements 4. Economic systems are developed as per the organizational requirements 5. Resources are utilized effectively as per the economic objectives. |
| 1. Apply demand and Supply in market analysis | 1. Market demand and Supply dynamics are determined in line with business objectives. 2. Factors affecting demand and supply are outlined as per the market trends. 3. Demand and Supply curves are derived as per market trends. 4. Decisions are made in line with elasticity of demand and Supply. |
| 1. Apply consumer behavior theory | 1. Consumer behavior approaches are identified as per the market trends. 2. Consumer utility is analyzed as per the consumer feedback. 3. Consumer equilibrium is analyzed based on consumer income and product prices 4. Indifference curves are applied as per organizational objectives |
| 1. Apply production theory | 1. Mobility of factors of production is determined as per organizational requirements. 2. Output units are determined as per organizational resources. 3. Stages of production are identified as per organizational products. 4. Long run production period is analyzed as per the organizational objectives |
| 1. Apply costs theory | 1. Production ***costs*** are classified as per organizational production policy. 2. Short run costs are analyzed as per Work procedures 3. Long run costs are analyzed as per Work procedures 4. Cost curves are analyzed as per organizational production policy. 5. Optimal size of the firm is determined based on economies of scale. |
| 1. Differentiate market structures. | 1. Market structures are determined as per economic system 2. Market output are determined as per economic system 3. Market prices are determined as per economic system 4. ***Market structures*** are selected as per organizational requirement |
| **7.** Determine national income | 1. **Concepts of national income** are identified as per the economic policies 2. Methods of measuring national income are identified as per regulatory policies 3. National income concepts are identified as per economic conditions. 4. Importance of national income statistics are applied as per the national economic policy. 5. Determine national income equilibrium as per national economic policy. |
| **8.** Understand Money and Banking | 1. Functions of money are determined as per the economic requirements. 2. Characteristics of money are identified as per financial regulations. 3. ***Financial institutions*** are identified as per financial market regulatory. 4. Functions of central and commercial banks are determined as per financial regulations. 5. Functions of non- banking financial institutions are identified as per financial institutions. |
| 9**.** Determine Inflation and unemployment | * 1. Types of inflation are identified as per the economic conditions   2. Inflation causes are classified as per the economic conditions   3. Inflation effects are identified as per the economic conditions   4. Measures of inflation control are determined as per the regulatory policies   5. Unemployment causes are identified as per the economic conditions   6. Unemployment control measures are determined as per the regulatory policies |
| 10. Understand International trade | 10.1Concept of international trade is determined as per the economic conditions.  10.2 International balance of payment is determined as per international trade. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Economic concepts may include but not limited to: | * 1. Economic resources   2. human wants   3. scarcity and choice   4. opportunity cost   5. production possibility curves/frontiers   6. wealth   7. welfare |
| 1. National income concepts include but not limited to: | * 1. gross domestic product (GDP   2. Gross national product (GNP) and net national product (NNP)   3. Net national income (NNI) at market price and factor cost   4. Disposable income |
| 1. Market structures may include but not limited to: | * 1. Monopoly   2. Perfect competition   3. Monopolistic competition   4. Oligopoly   5. Duopoly |
| 1. Financial institutions may include but not limited to: | * 1. Banking institutions   2. Non-banking financial institutions |
| 1. Costs may include but not limited to: | * 1. Fixed costs   2. Variable costs   3. Total cost   4. Opportunity costs   5. Marginal cost |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs knowledge of:

* Price theory
* Structure of markets and equilibrium
* Banking policies and procedures
* Market trends
* Financial markets

**SKILLS**

The individual needs the following skills:

* Interpersonal
* Critical thinking
* Communication
* Evaluation.
* Analytical

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Developed economic systems as per the organization requirement 2. Derived demand curve as per the market trends 3. Made decisions in line with elasticity of demand 4. Derived supply curve as per the market trends 5. Made decisions in line with elasticity of supply 6. Established Equilibrium price as per the market trends 7. Analyzed consumer equilibrium based on consumer income and product price 8. Applied indifference curves as per organizational objectives 9. Analyzed long run production period as per organizational objectives 10. Analyzed cost curves as per organizational production policy 11. Determined optimal size of the firm based on economies of scale 12. Selected market structures as per organizational requirement 13. Determined National income equilibrium as per national economic policy 14. Identified National income measurement methods based on fiscal policies 15. Applied national income statistics as per national economic policy 16. Identified financial institutions as per financial market regulatory authority 17. Determined functions of money as per economic requirement 18. Determined measures of inflation control as per the regulatory polices 19. Determined International balance of payment as per international trade |
| 1. Resource implications | The following resources should be provided:  2.1 Access to relevant workplace  2.2 Appropriately simulated environment where assessment can take place  2.3 Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. Poe evaluation 4. Third party reports 5. Written test |
| 1. Context of Assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guidance information for assessment | 5.1 Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# CORE UNITS OF COMPETENCY

**PERFORM PURCHASING ACTIVITIES.**

**UNIT CODE:** **0413 451 11A**

**UNIT DESCRIPTION**

This unit covers competencies required by a management assistant to organizational perform purchasing activities. It includes carrying out stock taking activities, processing purchase requisitions and maintaining inventory levels.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements**  The describes the key outcomes which make up workplace function | **Performance criteria**  These are assessable statements which specify the required level of performance for each of the elements |
| 1. Carry out stock taking activities | * 1. Opening inventory balance is verified as per work procedures   2. Inventory bin cardis updated as per procurement procedures   3. Inventory records are prepared as per work procedures   4. Periodic stock taking report is prepared as per accounting procedures |
| 1. Process purchase requisitions. | * 1. Purchase requisition is prepared as per procurement procedures   2. Prequalified suppliers record is prepared as per procurement procedures.   3. Purchase order is generated as per procurement procedures |
| 1. Maintain inventory levels. | * 1. **Purchased inventory** is received as per procurement procedure   2. **Inventory** is issued as per procurement procedures   3. Inventory records are prepared as per procurement procedures |

**RANGE**

This section provides a work environment and conditions to which the performance criteria apply. It allows for a different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| Purchased inventory include but not limited to | * Goods received notes * Delivery notes * Credit and debit notes * Inspection * Stores ledgers |
| Methods of issuing and valuation of inventory include: | * FIFO * LIFO * ABC analysis |

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| * + - 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   * 1. Issued inventory as per procurement procedures   2. prepared purchase requisition as per procurement procedures   3. Updated inventory bin card as per procurement procedures |
| * + - 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test   6. Oral questioning |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs to demonstrate the following skills

* Organizing skills
* Analytical skills
* Negotiation skills
* Interpersonal skills
* Communication skills
* Evaluation skills
* Problem solving
* Critical thinking
* Time management skills

**Required knowledge**

The individual needs to demonstrate knowledge of:

* Development of procurement plan
* Order management
* Demand forecasting
* Dealing with vendors
* Standard procurement documents
* Goods inspection
* Receiving of goods
* management of goods
* Handling of goods
* Handling delivery documents
* Occupational health and safety

**PERFORM SALES ACTIVITIES**

**UNIT CODE:** **0413 451 12A**

**UNIT DESCRIPTION**

This unit covers competencies required by a management assistant to perform sales activities. It includes carrying out sales promotion, responding to customers’ queries, maintaining sales records.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements**  The describes the key outcomes which make up workplace function | **Performance criteria**  These are assessable statements which specify the required level of performance for each of the elements |
| 1. Carry out sales promotion | * 1. **Promotional materials** are prepared as per sales procedures   2. Free samples are distributed as per sales procedures   3. Personal selling is carried out as per sales procedures |
| 1. Respond to customer queries | * 1. Customer details are recorded as per customer care procedures   2. complaints are recorded as per company procedures   3. Customer complaints feedback is communicated as per company procedures |
| 1. Maintain sales records | * 1. Sales records are classified as per company procedures   2. Sales recording system are selected as per company procedures   3. **Sales records** are prepared as per company procedures   4. Sales records are filed as per company procedures |

**RANGE**

This section provides a work environment and conditions to which the performance criteria apply. It allows for a different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| Promotional materials include but not limited to | * Flyers * Brochures * Samples * banners. |
| Sales records include but not limited to | * invoices, * receipts, * summaries. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs to demonstrate the following skills

* Organizing skills
* Analytical skills
* Negotiation skills
* Interpersonal skills
* Communication skills
* Evaluation skills
* Problem solving
* Critical thinking
* Time management skills
* ICT skills
* Listening skills

**Required knowledge**

* Product & service knowledge
* Business acumen
* Goods inspection
* Receiving of goods
* management of goods
* Handling of goods
* Handling delivery documents
* Occupational health and safety

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   1. Carried out personal selling as per sales procedures    1. Recorded Customer details as per customer care procedures    2. Recorded complaints as per company procedures    3. Prepared Sales records as per company procedures |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test   6. Oral questioning |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**PERFORM STAFFING ACTIVITIES**

**UNIT CODE: 0413 451 13A**

**UNIT DESCRIPTION**

This unit covers competencies required by a management assistant to perform staffing activities. It includes maintaining personnel records, employee attendance records, carrying out recruitment activities and inducting new employees.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements**  The describes the key outcomes which make up workplace function | **Performance criteria**  These are assessable statements which specify the required level of performance for each of the elements |
| 1. Maintain personnel records | * 1. Employee personal records are updated as per company procedures.   2. Communication records are maintained as per communication procedures   3. Employee records retrieval is carried out as per company procedures.   4. Personnel documents are referenced as per company procedures.   5. Personnel documents are filed as per company procedures. |
| 1. Maintain employee attendance records | * 1. Employees training attendance registers are prepared as per work procedures.   2. Daily work attendance registers is prepared as per work procedures.   3. Staff meetings attendance registers are prepared as per work procedures.   4. Employee attendance records are filed as per work procedures. |
| 1. Carry out recruitment activities | * 1. ***Recruitment logistics*** are carried out as per work procedures   2. Job applications are received as per work procedures   3. Job applications are sorted as per recruitment procedures.   4. Long listing is carried out as per recruitment procedures   5. Short listed candidates are ***contacted*** as per recruitment procedures |
| 1. Induct new employees | * 1. Induction program is communicated as recruitment procedures   2. Briefing venues is prepared as per work procedures   3. Induction materials are distributed as per work procedures   4. Induction familiarization tour is conducted as per work procedures |

**RANGE**

This section provides a work environment and conditions to which the performance criteria apply. It allows for a different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| Recruitment logistics May include but not limited | * venue booking, * scheduling * preparing recruitment materials * arranging interview panels. |
| contacted | * phone calls * emails, * SMS * official letters. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs to demonstrate the following skills

* Organizing skills
* Analytical skills
* Negotiation skills
* Interpersonal skills
* Communication skills
* Evaluation skills
* Problem solving
* Critical thinking
* Time management skills
* Inclusive mind sets

**Required knowledge**

* personnel management
* Industrial relations
* Industrial psychology

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the Updated   1. Update employee personal records as per company procedures. 2. Maintained Communication records as per communication procedures 3. Filed Employee attendance records as per work procedures. 4. carried out long listing as per recruitment procedures 5. Contacted short-listed candidates as per recruitment procedures 6. Conducted induction familiarization tour as per work procedures |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test   6. Oral questioning |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**PERFORM ADMINISTRATIVE ASSISTANT DUTIES**

**UNIT CODE:** **0413 451 14A**

**UNIT DESCRIPTION**

This unit covers competencies required by a management assistant to performing administrative duties. It includes maintaining official documents, handling office correspondences Overseeing office maintenance and administering support services.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements**  The describes the key outcomes which make up workplace function | **Performance criteria**  These are assessable statements which specify the required level of performance for each of the elements |
| 1. Maintain official documents | 1. Organization files are indexed as per organizational procedures.    1. File monitoring document is prepared as per organizational procedures.    2. Organization records are retrieved as per organizational records management procedure    3. organization records are **archived** as per organization procedure    4. Obsolete records are **disposed** as per organizational procedures |
| 1. handle office correspondences | * 1. **Office correspondence** is received as per organizational procedures.   2. Office mails are sorted out as per organizational procedures.   3. confidential and personal mails are delivered as per organizational procedures   4. Correspondence is recorded as per organizational procedures.   5. Office mails are distributed as per organizational procedures. |
| 1. Oversees office maintenance | * 1. Office and common areas cleaning is carried out as per occupational safety and health procedures   2. Implement office layout design as per approved layout.   3. Office supplies are stored as per organizational procedures.   4. Office supplies are issued as per organizational procedures   5. Service order schedules are prepared as per organizational procedures. |
| 1. Administer support services | * 1. Movement of furniture is carried out as per organizational procedures.   2. Outsourced services are monitored as per organization procedures.   3. Payment schedules are prepared as per organization procedures. |

**RANGE**

This section provides a work environment and conditions to which the performance criteria apply. It allows for a different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| Archiving can be | * manual * digital |
| Disposal may involve | * Shredding * Deletion * secure transfer. |
| Office correspondence may include | * Emails * Letters * Parcels * memos. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required skills**

The individual needs to demonstrate the following skills

* Organizing skills
* Analytical skills
* Negotiation skills
* Interpersonal skills
* Communication skills
* Evaluation skills
* Problem solving
* Critical thinking
* Time management skills

**Required knowledge**

* Computer knowledge.
* People management knowledge.

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   * 1. Indexed Organization files as per organizational procedures   2. Sorted out Office mails as per organizational procedures   3. Carried out Office and common areas cleaning as per occupational safety and health procedures   4. Monitored Outsourced services as per organization procedures. |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test   6. Oral questioning |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a workplace or simulated environment. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |