

**REPUBLIC OF KENYA**

**COMPETENCY-BASED MODULAR CURRICULUM**

**FOR**

**PROJECT MANAGEMENT**

**KNQF LEVEL 6**

**PROGRAMME CODE:** 0413 554A

©2025

All rights reserved. No part of this Curriculum may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods without the prior written permission of …………… except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law. For permission requests, write to the…………… at the address below:

**Council Secretary/CEO/Chief Principal**

**………………..**

**P.O. Box …………..**

**Email: ………………**

# **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 of 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, curriculum 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 curriculum development to ensure the curriculum addresses its competence needs. It is against this background that this Curriculum has been developed.

It is my conviction that this curriculum will play a great role towards development of competent human resource for the project management sector’s growth and sustainable development.

**PRINCIPAL SECRETARY**

**STATE DEPARTMENT FOR TVET**

**MINISTRY OF EDUCATION**

# **PREFACE**

Kenya Vision 2030 aims to transform Kenya into a newly industrializing middle-income country, providing high-quality life to all its citizens by the year 2030. Kenya intends to create globally competitive and adaptive human resource base to meet the requirements of a rapidly industrializing economy through lifelong education and training. TVET has a responsibility to facilitate 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).

TVET Act CAP 210A and Sessional Paper No. 1 of 2019 on Reforming Education and Training in Kenya for Sustainable Development emphasized the need to reform curriculum 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 the Kenyan labour force.

This curriculum has been developed in adherence to the Kenya National Qualifications Framework and CBETA standards and guidelines. The curriculum is designed and organized into Units of Learning with Learning Outcomes, suggested delivery methods, learning resources, and methods of assessing the trainee’s achievement. In addition, the units of learning have been grouped in modules to concretize the skills acquisition process and streamline upskilling.

I am grateful to all expert trainers and everyone who played a role in translating the Occupational Standards into this competency-based modular curriculum.

**CHAIR OF COUNCIL**

**(QAI)**

# **ACKNOWLEDGEMENT**

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

I recognize with appreciation the role of the Sector Skills Advisory Committee (SSAC) in ensuring that competencies required by the industry are addressed in this curriculum. I also thank all stakeholders in the project management sector for their valuable input and all those who participated in the process of developing this curriculum.

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

**COUNCIL SECRETARY/CEO**

**QAI**

# **ACRONYMS**

**SSAC** Sector Skills Advisory Committee

**NSSC** National Sector Skills Committee

**CBET** Competency Based Education and Training

**CD** Compact Disc

**CPU** Central Processing Unit

**CV** Curriculum Vitae

**DVD** Digital Video Disc

**DVI** Digital Visual Interface

**HDMI** High-Definition Multimedia Interface

**IAS**  International Accounting Standards

**ICT** Information Communication Technology

**ISCED** International Standards Classification of Education

**MS** Microsoft

**RAM** Random Access Memory

**TVET** Technical and Vocational Education and Training

**USB** Universal Serial Bus

**VGA** Video Graphics Array

**IAS** International Accounting Standards

**CCTV** Closed-circuit Television

**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

# **TABLE OF CONTENTS**

[**FOREWORD** 3](#_Toc197032847)

[**PREFACE** 4](#_Toc197032848)

[**ACKNOWLEDGEMENT** 5](#_Toc197032849)

[**ACRONYMS** 6](#_Toc197032850)

[**KEY TO UNIT CODE** 7](#_Toc197032851)

[**TABLE OF CONTENTS** 8](#_Toc197032852)

[**COURSE OVERVIEW** 11](#_Toc197032853)

[**MODULE 1** 16](#_Toc197032854)

[BUSINESS COMMUNICATION 16](#_Toc197032855)

[WORK ETHICS AND PRACTICES 23](#_Toc197032856)

[FINANCIAL ACCOUNTING 28](#_Toc197032857)

[PROJECT INCEPTION 35](#_Toc197032858)

[**MODULE 2** 41](#_Toc197032859)

[DIGITAL LITERACY 42](#_Toc197032860)

[ENTREPRENEURIAL SKILLS 53](#_Toc197032861)

[PROJECT STAKEHOLDERS 60](#_Toc197032862)

[PROCUREMENT OF GOODS, WORK AND SERVICES 64](#_Toc197032863)

[**MODULE 3** 67](#_Toc197032871)

[PRINCIPLES OF COMMERCIAL LAW 68](#_Toc197032872)

[MANAGEMENT SKILLS 77](#_Toc197032873)

[BASIC MATHEMATICS AND STATISTICS 83](#_Toc197032874)

[PROJECT ENVIRONMENTAL MANAGEMENT 89](#_Toc197032875)

[**MODULE 4** 92](#_Toc197032876)

[PRINCIPLES OF ECONOMICS 93](#_Toc197032877)

[RESEARCH STUDY 102](#_Toc197032878)

[PROJECT PLANNING AND DESIGN 108](#_Toc197032879)

[PROJECT IMPLEMENTATION 114](#_Toc197032891)

[**MODULE 5** 119](#_Toc197032898)

[PROJECT MONITORING AND EVALUATION 120](#_Toc197032899)

[PROJECT AUDITING AND REVIEW 125](#_Toc197032928)

[PROJECT CLOSURE 130](#_Toc197032938)

# **COURSE OVERVIEW**

Project Management Level 6 modular-curriculum consists of competencies that an individual must achieve to manage projects. It entails managing project inception phase, managing [project planning and design, managing](#_bookmark12) [project implementation, managing](#_bookmark13) [project monitoring and evaluation,](#_bookmark15) and managing project closure.

The qualification consists of basic, common and core competencies.

**MODULE 1**

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Code** | **Unit Title** | **Duration in Hours** | **Credit factors** |
| 0031 451 04A | Business Communication | 80 | 8 |
| 0417 451 02A | Work Ethics and Practices | 40 | 4 |
| 0411 451 05A | Financial Accounting | 120 | 12 |
| 0413 451 11A | Project inception | 140 | 14 |
| **Total** | | **380** | **38** |

**MODULE 2**

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Code** | **Unit title** | **Duration in hours** | **Credit factors** |
| 0611 551 01A | Digital Literacy | 40 | 4 |
| 0413 451 03A | Entrepreneurial Skills | 40 | 4 |
| 0413 451 12A | Project stakeholders | 50 | 5 |
| 0416 451 13A | Procurement of goods, works and services | 60 | 6 |
| **Total** | | **190** | **19** |

**MODULE 3**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Unit Code** | | **Unit Title** | **Duration in Hours** | **Credit factors** |
| 0421 451 07A | | Principles of Commercial Law | 110 | 11 |
| 0413 441 06A | | Management Skills | 70 | 7 |
| 0413 454 08A | | Business Mathematics and Statistics | 100 | 10 |
| 0522 451 14A | | Project environmental management | 120 | 12 |
| **Total** | | | **400** | **40** |
| **MODULE 4** | | | | |
| 0311 551 10A | | Economic Principles | 80 | 8 |
| 0416 551 09A | | Research Project | 120 | 12 |
| 0413 551 15A | | Project planning and design | 160 | 16 |
| 0413 551 16A | | Project implementation | 100 | 10 |
| **Total** | | | **470** | **47** |
| **MODULE 5** | | | | |
| 0413 551 17A | Monitoring and Evaluation | | 180 | 18 |
| 0413 551 18A | Project audit and review | | 120 | 12 |
| 0413 551 19A | Project closure | | 100 | 10 |
| **Total** | | | **400** | **40** |
| **INDUSTRIAL PLACEMENT** | | | **480** | **48** |
| **GRAND TOTAL** | | | **2500** | **250** |

The core units of learning are independent of each other and may be taken independently. The total duration of the course is 2500 hours inclusive of industrial attachment.

**Entry Requirements**

An individual entering this course should have any of the following minimum requirements:

1. Kenya Certificate of Secondary Education (KCSE) minimum mean grade C- (Minus)/ KCE Division 3, KACE 1 Principal and 1 Subsidiary Or
2. Assistant Project Manager Level 5 Certificate

Or

1. Any other qualification Equivalent to that of Assistant Project manager Level 5 as may be determined by TVETA.

**Trainer qualification**

 A trainer training this course MUST;

1. Have a minimum of Level 7 qualification in Project management or in the related field.
2. Be registered by TVETA

**Industry Training**

An individual enrolled in this course will be required to undergo Industry training for a minimum period of 480 hours in the project management sector. The industrial training may be taken after completion of all units for those pursuing the full qualification or be distributed equally in each unit for those pursuing part qualifications. In the case of dual training model, industrial training shall be as guided by the dual training policy.

**Assessment and certification**

The course shall be assessed formatively and summatively:

1. During formative assessment all performance criteria shall be assessed based on performance criteria weighting.
2. Number of formative assessments shall minimally be equal to the number of elements in a unit of competency.
3. During summative assessment basic and common units may be integrated in the core units or assessed as discrete units.
4. Theoretical and practical weight for each unit of learning shall be as follows:
5. 30:70 for units in module 1 to module 3
6. 40:60 for units in module 4 and module 5
7. Formative and summative assessments shall be weighted at 60% and 40% respectively in the overall unit of learning score

For a candidate to be declared competent in a unit of competency, the candidate must meet the following conditions:

1. Obtained at least 40% in theory assessment in formative and summative assessments.
2. Obtained at least 60% in practical assessment in formative and summative assessment where applicable.
3. Obtained at least 50% in the weighted results between formative assessment and summative assessment where the former constitutes 60% and the latter 40% of the overall score.
4. Assessment performance rating for each unit of competency shall be as follows:

|  |  |
| --- | --- |
| **MARKS** | **COMPETENCE RATING** |
| 80 -100 | Attained Mastery |
| 65 - 79 | Proficient |
| 50 - 64 | Competent |
| 49 and below | Not Yet Competent |
| Y | Assessment Malpractice/irregularities |

1. Assessment for Recognition of Prior Learning (RPL) may lead to award of part and/or full qualification.

**Certification**

A candidate will be issued with a Certificate of Competency upon demonstration of competence in a core Unit of Competency. To be issued with Kenya National TVET Certificate in Project Management Level 6, the candidate must demonstrate competence in all the Units of Competency as given in the qualification pack. A Statement of Attainment certificate may be awarded upon demonstration of competence in certifiable element within a unit.

These certificates will be issued by Qualification Awarding Institution.

# **MODULE 1**

**BUSINESS COMMUNICATION**

**UNIT CODE:** 0031 451 04A

**Duration of Unit:** 80 Hours

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Apply business communication skills.

**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.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HOURS)** |
|  | Administer Communication Channels. | 12 |
|  | Implement types of communication | 15 |
|  | Implement service charter | 7 |
|  | Safeguard confidentiality of information | 12 |
|  | Coordinate communication on social media platforms | 10 |
|  | Prepare work place meetings | 14 |
|  | Prepare workplace report | 10 |
|  | **TOTAL** | **80HRS** |

**Learning Outcomes, Content and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| 1. Administer Communication channels | 1. Communication process 2. Principles of effective communication 3. Channels/medium/modes of communication 4. Factors to consider when selecting a channel of communication 5. Barriers to effective communication 6. Flow/patterns of communication 7. Sources of information 8. Organizational policies 9. Record keeping | 1. Written tests 2. Third party report 3. Portfolio of Evidence 4. Projects |
| 1. Implement types of communication | * 1. Written Communication      1. Types of written communication      2. Elements of communication      3. Organization requirements for written communication   2. Non- Verbal      1. Utilize body language and      2. Gestures      3. Apply body posture      4. Apply workplace dressing code   3. Oral Communication      1. Types of oral communication pathways      2. Effective questioning techniques      3. Interviews      4. Workplace etiquette      5. Active listening | 1. Written tests 2. Third party report 3. Portfolio of Evidence 4. Projects |
| 1. Implement service charter | * 1. Introduction to service charter   2. Importance of service charter   3. Correspondence response   4. Retrieval of records | * Oral questioning * Observation * Written report |
| 1. Safeguarding confidentiality of information | * 1. Introduction to information confidentiality   2. Physical securing of records and correspondences      1. Lock and key      2. Reinforced storage      3. Fireproofing      4. Lockable cabinets      5. Restricted access   3. Monitoring of records and correspondence   4. Information security   5. Sensitization of employees on information confidentiality   6. Tracing of records and correspondences | * Oral questioning * Observation * Written report |
| 1. Coordinate communication on social media platforms | * 1. Social media requirements   2. Social media policies and procedures   3. Social media platforms   4. Social media content sourcing   5. Customer interactions on social media   6. Social media accounts update   7. Adherence to legal and ethical practices   8. Social media monitoring tools      1. Twitter counter      2. Hootsuite      3. Klout      4. Buzzlogix      5. Digimind   9. Social media engagements report implementation | * Oral questioning * Observation * Written questions * Project |
| 1. Prepare work place meetings | * 1. Introduction to minute taking   2. Types of meetings   3. Structure of meetings      1. Notice      2. Agenda      3. Preparation of other relevant documents      4. Minute formats | * Oral questioning * Observation * Oral presentation * Written report * Project |
| 1. Prepare workplace report | * 1. Introduction to report writing      1. Definition      2. Principles e.g. conciseness, clarity   2. Importance of reports   3. Forms and types of reports      1. Oral reports      2. Written reports      3. Recorded   4. Reports formats      1. Letter format      2. Memo format   5. Reports preparation | * Oral questioning * Observation * Written report * Project |

**Suggested Methods of instructions**

* Instructor led facilitation of theory
* Demonstration by trainer
* Practical work by trainee
* Viewing of related videos
* Project
* Group discussions

**Recommended Resources for 30 trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**Suggested Methods of Instruction**

* Discussion
* Role playing
* Simulation
* Direct instruction
* Field trips

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

**WORK ETHICS AND PRACTICES**

**UNIT CODE:** 0417 451 02A

**Duration of Unit:** 60 hours

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Apply Work Ethics and Practices.

**Unit Description**

This unit covers competencies required to demonstrate employability skills. 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.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENT** | **DURATION (HRS)** |
|  | Apply self-management skills | **5** |
|  | Promote ethical practices and values | 4 |
|  | Promote Teamwork | 9 |
|  | Maintain professional and personal development | **5** |
|  | Apply Problem-solving skills | 10 |
|  | Promote Customer care | 7 |
|  | **TOTAL** | **40HRS** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| 1. Apply self-management skills | * 1. Formulating personal vision, mission, and goals   2. Self-awareness   3. Emotional intelligence and coping with Work Stress.   4. Assertiveness development   5. Accountability and responsibility for one’s actions   6. Time management, attendance and punctuality   7. Setting performance targets   8. Self-strengths and weaknesses   9. Motivation, initiative and proactivity   10. Individual performance evaluations | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical |
| 1. Promote ethical work practices and values | * 1. Integrity   2. Organizational codes of conduct   3. Industry policies and procedures   4. Professionalism | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical |
| 1. Promote Teamwork | * 1. Teams      1. Small work group      2. Staff in a section/department      3. Inter-agency group      4. Virtual teams   2. Team roles and objectives   3. Team activities   4. Team performance   5. Conflict resolution      1. Interpersonal Conflict.      2. Intrapersonal Conflict.      3. Intergroup Conflict.      4. Intragroup Conflict.   6. Gender and diversity mainstreaming   7. Healthy workplace relationships      1. Man/Woman      2. Trainer/trainee      3. Employee/employer      4. Client/service provider      5. Husband/wife      6. Boy/girl      7. Parent/child      8. Sibling relationships   8. Adaptability and flexibility | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical Assessment |
| 1. Maintain professional and personal development | * 1. Personal development and growth      1. Growth in the job      2. Career mobility      3. Gains and exposure the job gives      4. Net workings      5. Benefits that accrue to the individual as a result of noteworthy performance   2. Training and career opportunities      1. Participation in training programs      2. Serving as Resource Persons in conferences and workshops      3. Capacity building   3. Training resources      1. Human      2. Financial      3. Technology   4. Licenses and certifications for professional growth and development   5. Recognitions in career advancement   6. Work-life balance   7. Dynamism and on-the-job learning | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical |
| 1. Apply Problem-solving skills | * 1. Creative, innovative and practical solutions      1. New ideas      2. Original ideas      3. Different ideas      4. Methods/procedures      5. Processes      6. New tools   2. Independence and initiative in problem identification and solving   3. Problem-solving process   4. Methods of solving problems   5. Problem analysis and assumption testing | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical |
| 1. Promote Customer Care | * 1. Identifying customer needs   2. Customer feedback methods      1. Verbal      2. Written      3. Informal      4. Formal   3. Resolving customer concerns   4. Customer outreach programs   5. Customer retention | * Written assessment * Oral assessment * Third party reports * Portfolio of evidence * Project * Practical |

**Suggested Methods of Instruction**

* Simulation/Role play
* Group Discussion
* Presentations
* Projects
* Case studies
* Assignments

**FINANCIAL ACCOUNTING**

**UNIT CODE: 0411 451 05A**

**Duration of unit:** 120 hours

**Relationship to occupational standards**

This unit addresses the unit of competency: Apply Financial Accounting Skills.

**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.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Apply accounting concepts, conventions and policies | 8 |
|  | Prepare books of original entries | 10 |
|  | Post transaction to the ledger | 16 |
|  | Prepare cash books | 10 |
|  | Correct accounting errors | 16 |
|  | Prepare bank reconciliation statements | 8 |
|  | Maintain non-current assets’ register | 18 |
|  | Maintain receivables and payables ledge | 13 |
|  | Prepare sole trader statements | 20 |
|  | **TOTAL** | **120 HRS** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning outcomes** | **Content** | **Assessment methods** |
| 1. Apply accounting concepts, conventions and policies | * 1. Accounting concepts, conventions and policies      1. Going concern      2. Accrual      3. Prudence      4. Matching   2. Accounting equation   3. Users of accounting information | * Practical assessments * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Prepare books of original entries | * 1. Classification of transactions      1. Cash transactions      2. Credit transactions   2. Source documents      1. Invoices      2. Vouchers      3. Receipts   3. Books of original entry      1. Purchases day book      2. Sales day book      3. Petty cash book   4. Source documents recording | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Post transaction to the ledger | * 1. Classification of ledgers      1. General ledger      2. Sales ledger      3. Purchases ledger   2. ledger accounts identification   3. Posting of transactions to ledgers   4. Balancing off ledger accounts   5. Trial Balance   6. Preparation of Trial Balance | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Prepare cash books | 4.1 Cash books  4.1.1 Two column cashbook   * + 1. Three column cashbook     2. Petty cashbook   1. Classification of cash receipts   2. Recording of cash receipts   3. Discounts      1. Cash discounts      2. Trade discounts      3. Quantity discounts | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Correct accounting errors | * 1. Errors affecting the trial balance   2. Errors that do not affect the trial balance   3. Correction of errors   4. Suspense account   5. Reported gross/net profit   6. The final statement of financial position | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Prepare bank reconciliation statements | * 1. Cash book and bank statement balance discrepancies:      1. Items appearing in the cashbook but not in the bank statement      2. Items appearing in the bank statement but not in the cash book      3. Errors   2. Update the cash book   3. Bank reconciliation statement | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Maintain non-current assets’ register | * 1. Determining costs of assets as per Accounting standards   2. Depreciation computation   3. Depreciation recording as per accounting guidelines   4. Accounting treatment on depreciation   5. Acquisition of Non-current assets   6. Disposal of non-current assets   7. Determining asset balances | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Maintain receivables and payables ledgers | * 1. Bad debts written off   2. Provision for bad debts   3. Adjusting receivable balances   4. Adjusting Payable balances   5. Control accounts:      1. Sales ledger control account      2. Purchases ledger control account | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Prepare sole trader statements | 9.1. Income and expenditure  9.2. Year-end adjustments  9.3. Accruals  9.4 Prepayments  9.5 Provisions  9.6 Statement of profit or loss  9.7 Statement of financial position items  9.8 Statement of financial position | * Practical * Projects * Poe evaluation * Third party reports * Written tests |

**Suggested delivery methods**

* Demonstration
* Practical work by trainee
* Fieldwork and benchmarking
* Group discussions
* Case studies
* Role play

**List of Recommended Resources for 30 trainees**

**Tools, Equipment and Materials**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

## **PROJECT INCEPTION**

**UNIT CODE:** 0413 451 11A

**Relationship to Occupational Standards**

This unit addresses the unit of competency: Manage project Inception Phase.

**Duration of Unit:** 140 Hours

**Unit Description**

This unit covers the competencies required to manage project inception phase. It involves performing situation analysis, developing concept note, developing business case, carrying out feasibility study, developing benefits management plan, preparing project proposal, seeking project approval and disseminate project approval report to relevant stakeholders, documenting source selection criteria and preparing project acceptance and closure criteria.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S/NO** | **ELEMENTS** | **DURATION(HRS)** |
|  | Perform situation analysis | 6 |
|  | Develop concept note | 10 |
|  | Develop business case | 4 |
|  | Carry out feasibility study | 10 |
|  | Develop Benefits Management plan | 6 |
|  | Prepare project proposal | 12 |
|  | Seek project approval and disseminate project approval report to relevant stakeholders | 8 |
|  | Document Source Selection criteria | 8 |
|  | Prepare Project Acceptance and Closure criteria | 6 |
|  | **TOTAL** | **70** |

**Learning Outcomes, Content and Methods of Assessment**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Methods of Assessment** |
| * 1. Perform situation analysis | * 1. Problem statement information gathering   2. Problem statement stakeholders identified   3. Problem analysis   4. Objective analysis   5. Alternatives analysis   6. Stakeholders feedback analysis | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Develop concept note | 2.1 Statement of project context and rationale  2.2 Project goals and objectives  2.3 project cost estimation  2.4 Benefits of the project | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Develop business case | 3.1 Statement of the problem  3.2 Alternative solutions  3.3 Cost benefit analysis  3.4 Solution recommendation  3.5 Implementation | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Carry out feasibility study | * 1. Types of feasibility study      1. Economical      2. Financial      3. Technical      4. Social      5. Ecological      6. Political   2. Tools and participants for the feasibility study      1. Interviews      2. Questionnaires      3. Observations      4. Focus group discussions      5. Project selection and appraisal techniques   4.3 Data collection, analysis and documentation  4.4 Decision making | * Practical * Projects * Poe evaluation * Third party reports * Written tests |
| 1. Develop Benefits Management plan | * 1. Project benefits   2. Benefits owners   3. Benefit schedule   4. Benefit sustainability plan | * Oral questioning * Written tests |
| 1. Prepare project proposal | * 1. Meaning of project proposal   2. Components of a project proposal   3. Format of project proposal   4. Factors to consider in proposal writing | * Oral questioning * Written tests |
| 1. Seek project approval and disseminate approval report to relevant stakeholders | * 1. Feasibility study report evaluation   2. Project approval by the relevant stakeholders   3. Feasibility study report dissemination methods e.g. Sending feasibility study analysis | * Oral questioning * Written tests |
| 1. Prepare supplier selection criteria | * 1. Supplier prequalification criteria   2. Process of supplier prequalification   3. Evaluation of suppliers | * Oral questioning * Written tests |
| 1. Prepare Project Acceptance and Closure criteria | * 1. Closure criteria   2. Acceptance criteria   3. Process of developing acceptance criteria   4. Process of developing closure criteria | * Oral questioning * Written tests |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Field work by the trainee
* Field trips
* Viewing of related videos

**Recommended Resources for 30 trainees**

* Sample Questionnaires
* Computers
* Communication devices
* Recorders
* Internet
* Cameras
* Stationery
* Transport means
* Meeting venues

**List of Recommended Resources for 30 trainees**

**Tools, Equipment and Materials**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

1. Organization operating procedures
2. Industry/workplace codes of practice
3. Cooperative societies act
4. Sacco societies act
5. Text books
6. Cooperative society journals
7. Magazines
8. E-learning resources
9. Occupational standards

# **MODULE 2**

**DIGITAL LITERACY**

**UNIT CODE:** 0611 551 01A

**Duration of Unit:** 40 Hours

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Apply Digital Literacy

**Unit Description**

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

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Apply communication channels Operate Computer Devices | 6 |
|  | Solve Tasks Using Office Suite | 6 |
|  | Manage Data and Information | 6 |
|  | Perform Online Communication and Collaboration | 6 |
|  | Apply Cyber security Skills | 5 |
|  | Perform Online Jobs | 5 |
|  | Apply job entry techniques | 6 |
|  | **TOTAL** | **40HRS** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested**  **Assessment Methods** |
| --- | --- | --- |
| 1. Operate computer devices | * 1. Computer device Desktops      1. Laptops      2. Smartphones      3. Tablets      4. Smartwatches   2. Computer Hardware      1. The System Unit E.g. Motherboard, CPU, casing      2. Input Devices e.g. Pointing, keying, scanning, voice/speech recognition, direct data capture devices.      3. Output Devices e.g. hardcopy output and softcopy output      4. Storage Devices e.g. main memory e.g. RAM, secondary storage (Solid state devices, Hard Drives, CDs & DVDs, Memory cards, Flash drives      5. Computer Ports e.g. HDMI, DVI, VGA, USB type C   3. Classification of computer software   1.3.1 System software e.g. Operating System (Windows, Macintosh, Linux, Android, iOS)  1.3.2 Application Software e.g. Word Processors, Spreadsheets, Presentations etc.  1.3.3 Utility Software e.g. Antivirus programs   * 1. Procedure for turning on and off computer devices   2. Mouse use techniques   1.5.1 Clicking  1.5.2 Double-clicking  1.5.3 Right-clicking  1.5.4 Drag and drop   * 1. Keyboard Techniques   2. File and folders creation   3. Computer Internet Connection Options      1. Mobile Networks/Data Plans      2. Wireless Hotspots      3. Cabled (Ethernet/Fiber)      4. Dial-Up      5. Satellite   4. Computer external devices management      1. Device connections      2. Device controls (volume controls and display properties) | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 1. Solve tasks using Office suite | 2.1 Word Processing concepts  2.1.1 Creating word documents  2.1.2 Editing word documents  2.1.3 Formatting word documents  2.1.4 Saving word document  2.1.5 Printing word documents  2.2 Worksheet data preparation  2.3 Worksheet data editing   * 1. Data manipulation on a worksheet      1. Use of formulae      2. Use of functions      3. Sorting      4. Filtering      5. Visual representation using charts   2. Worksheet saving and printing   3. Electronic presentation concepts   4. Worksheet printing   5. Electronic Presentation concepts      1. Creating slides      2. Editing slides      3. Formatting slides      4. Applying slide effects and transitions      5. Creating and playing slideshows      6. Saving presentations      7. Printing slides and handouts | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 1. Manage Data and Information | * 1. Types of internet services      1. Communication Services      2. Information Retrieval Services      3. File Transfer      4. World Wide Web Services      5. Web Services      6. Automatic Network Address Configuration      7. News Group      8. Ecommerce   2. Types of Internet Access Applications      1. Browsers      2. Email Apps      3. E-commerce Apps   3. Internet search   4. Online digital content download   5. Identification and back up of digital content | * Portfolio of Evidence * Project * Written assessment * Practical assessment * Oral assessment |
| 1. Perform online communication and collaboration | * 1. Netiquette principles   2. Communication concepts      1. Online communities      2. Communication tools      3. Email concepts   3. Using email      1. Sending email      2. Receiving email      3. Tools and settings      4. Organizing email   4. Digital content copyright and licenses   5. Online collaboration tools      1. Online Storage (Google Drive)      2. Online productivity applications (Google Docs & Forms)      3. Online meetings (Google Meet/Zoom)      4. Online learning environments      5. Online calendars (Google Calendars)      6. Social networks (Facebook/Twitter - Settings & Privacy)   6. Preparation for online collaboration      1. Common setup features      2. Setup   7. Mobile collaboration      1. Key concepts      2. Using mobile devices      3. Applications      4. Synchronization | * Observation * Portfolio of Evidence * Project * Written assessment * Practical assessment * Oral assessment |
| 1. Apply cybersecurity skills | * 1. Data protection and privacy      1. Confidentiality of data/information      2. Integrity of data/information      3. Availability of data/information   2. Internet security threats      1. Malware attacks      2. Social engineering attacks      3. Distributed denial of service (DDoS)      4. Man-in-the-middle attack (MitM)      5. Password attacks      6. IoT Attacks      7. [Phishing Attacks](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#phishing-attacks)      8. [Ransomware](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#ransomware)   3. Computer threats and crimes   4. Cybersecurity control measures      1. Physical Controls      2. Technical/Logical Controls (Passwords,PINs, Biometrics)      3. Operational Controls   5. Laws governing protection of ICT in Kenya      1. The Computer Misuse and Cybercrimes Act No. 5 of 2018      2. The Data Protection Act No. 24 Of 2019 | * Observation * Portfolio of Evidence * Project * Written assessment * Practical assessment * Oral assessment |
| 1. Perform Online Jobs | * 1. Introduction to online working   2. Types of online Jobs   3. Online job platforms      1. Remotask      2. Data annotation tech      3. Cloud worker      4. Upwork      5. Oneforma      6. Appen   4. Online account and profile management   5. Identifying online jobs/job bidding   6. Online digital identity   7. Executing online tasks   8. Management of online payment accounts. | * + Observation   + Portfolio of Evidence   + Project   + Written assessment   + Practical assessment   + Oral assessment |
| 1. Apply job entry techniques | * 1. Types of job opportunities      1. Self-employment      2. Service provision      3. product development      4. salaried employment   2. Sources of job opportunities   3. Resume/ curriculum vitae   4. Job application letter      1. What to include      2. Addressing a cover letter      3. Signing off a cover letter   5. Portfolio of Evidence      1. Academic credentials      2. Letters of commendations      3. Certification of participations      4. Awards and decorations   7.6 Interview skills   * 1. Generally knowledgeable in current affairs and technical area | * + Observation   + Oral assessment   + Portfolio of evidence   + Third party report   + Written assessment |

**Suggested Methods of Instruction**

* + Practical work by trainees
  + Viewing of related videos
  + Group discussions
  + Project
  + Role play
  + Case study

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

**ENTREPRENEURIAL SKILLS**

**UNIT CODE:** 0413 451 03A

**Duration of unit:** 40 hours

**Relationship to occupational standards**

This unit addresses the unit of competency: Apply Entrepreneurial Skills.

**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, and developing business innovative strategies and business plans.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Apply financial literacy | 6 |
|  | Apply the entrepreneurial concept | 7 |
|  | Identify entrepreneurship opportunities | 6 |
|  | Apply business legal aspects | 7 |
|  | Innovate Business Strategies | 8 |
|  | Develop a business plan | 6 |
|  | TOTAL | **40** |

**Learning Outcomes, Content and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| * Apply financial literacy | * 1. Sources of personal and business funds      1. Salary/Wages      2. Investments      3. Savings      4. Inheritance      5. Government Benefits      6. Equity financing      7. Debt financing      8. Retained earnings      9. Leasing and asset financing   2. Personal finance management   3. Saving management   4. Debt management   5. Investment decisions   6. Types of investments   7. Insurance services   8. insurance products available in the market   9. Insurable risks | * Project * Written assessment * Oral assessment * Third party report * Interviews |
| 2.Apply entrepreneurial concept | * 1. Difference between Entrepreneurs and Business persons   2. Types of entrepreneurs      1. Innovators      2. Imitators      3. Craft      4. Opportunistic      5. Speculators   3. Ways of becoming an entrepreneur   4. Characteristics of Entrepreneurs      1. Creative      2. Innovative      3. Planner      4. Risk taker      5. Networker      6. Confident      7. Flexible      8. Persistent      9. Patient      10. Independent      11. Future oriented      12. Goal oriented   5. Salaried employment and self-employment   6. Requirements for entry into self-employment      1. Technical skills      2. Management skills      3. Entrepreneurial skills      4. Resources      5. Infrastructure   7. Roles of an Entrepreneur in an enterprise   8. Contributions of Entrepreneurship | 1. Project 2. Written assessment 3. Oral assessment 4. Third party report |
| 3.Identify entrepreneurship opportunities | * 1. Sources of business ideas   2. Factors to consider when evaluating business opportunity   3. Entrepreneurial opportunities   4. Business ideas and opportunities generation   5. Business life cycle | * Project * Written assessment * Oral assessment * Third party report |
| 4.Apply business legal aspects | * 1. Forms of business ownership      1. Sole proprietorship      2. Partnership      3. Limited companies      4. Cooperatives   2. Business registration and licensing processing   3. Types of contracts and agreements   4. Employment laws   5. Taxation laws | * Project * Written assessment * Oral assessment * Third party report |
| 5.Innovate business Strategies | 5.1 Innovative business strategies  5.2 Creativity in business  5.3 Development of innovative business standards   * + 1. New products     2. New methods of production     3. New markets     4. New sources of supplies   5.4 Entrepreneurial Linkages  5.5 ICT in business growth and development | * Project * Written assessment * Oral assessment * Third party report |
| 6.Develop Business Plan | 6.1 Business idea description  6.2 Business idea development  6.3 Marketing plan  6.4Organizational/Management  Plan  6.5 Production/operation plan  6.6 Financial plan  6.7 Executive summary  6.8 Business plan presentation  6.9 Business idea incubation | * Written assessment * Project * Oral assessment * Third party report |

**Suggested Methods of Instruction**

* Direct instruction with active learning strategies
* Project (Business plan)
* Case studies
* Field trips
* Group Discussions
* Demonstration
* Question and answer
* Problem solving
* Experiential
* Team training
* Guest speakers

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

**PROJECT STAKEHOLDERS**

**UNIT CODE:** 0413 451 12A

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Manage project stakeholders.

**Duration of Unit:** 50 hours

**Unit Description**

This unit describes competencies required to manage project stakeholders. It involves performing stakeholder analysis, managing stakeholder communication, undertaking stakeholder engagement.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENT** | **DURATION (HRS)** |
|  | Performing stakeholder analysis | 15 |
|  | Managing stakeholder communication | 15 |
|  | Undertaking stakeholder engagement | 20 |
|  | **TOTAL** | **50** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| 1. Perform stakeholder analysis | 1. Meaning of stakeholder analysis 2. Importance of stakeholder analysis 3. Stakeholder matrix    * 1. Power-interest matrix      2. Support and importance stakeholder matrix      3. Stakeholder analysis matrix      4. Stakeholder engagement assessment matrix   1.4 Project stakeholder duties and responsibilities  1.5 Establishment of project stakeholder interests | * Oral questioning * Written tests * Case studies * Scenario analysis |
| 1. Manage   stakeholder communication | 1. Project stakeholders communication needs 2. Project stakeholder communication planning 3. Channels of stakeholder communications    * 1. Electronic      2. Print      3. Digital 4. Methods of communication    * 1. Written      2. Audio-visual      3. Verbal versus non-verbal 5. Feedback receipt 6. Communication documentation 7. Feedback dissemination | * Oral questioning * Written tests * Case study |
| 1. Undertake stakeholder engagement | 1. Stakeholder relationship 2. Stakeholder engagement strategy 3. Methods of monitoring stakeholder engagement 4. Stakeholder engagement report. 5. Use of tools such as;    * 1. Quatrics XM      2. Survey monkey Genius | * Oral questioning * Written tests * Case study * Scenario analysis |

**Suggested Methods of Instruction**

* + Instructor led facilitation of theory
  + Demonstration by trainer
  + Group discussion
  + Field trips
  + Viewing of related videos and models
  + Dual training

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** |  |  |  |
|  | Textbooks |  | 5 pcs | 1:6 |
|  | Magazines |  |  |  |
|  | Project stakeholders Journals |  |  |  |
|  | PowerPoint presentations | For trainer’s use |  |  |
|  | Projector |  | 1 | 1;30 |
|  | Whiteboard |  | 1 | 1;30 |
|  | Rolls flip charts |  | 1 | 1;30 |
|  | Assorted color of whiteboard markers | For trainers Use |  |  |
| **B** | **Learning Facilities & infrastructure** |  |  |  |
|  | Lecture/theory room |  | 1 | 1:30 |
|  | Meeting venues |  | 1 | 1:30 |
| **C** | **Consumable materials** |  |  |  |
|  | Assorted whiteboard markers |  | 30 | 1:1 |
|  | Internet connection |  | 200 mbps | - |
|  | Antivirus Software |  |  | - |
|  | Printing Papers |  | Enough | - |
|  | Transport means |  |  | 1:30 |
|  | External storage media |  | 1 tb | - |
| **D** | **Tools and Equipment** |  |  |  |
|  | Printers |  | 2 pcs | 2:30 |
|  | Recorders | For trainees |  | 1:1 |
|  | Laptop/Computers | For Trainees |  | 1:2 |
|  | Mobile phones |  | 10 | 10:30 |

**PROCUREMENT OF GOODS, WORK AND SERVICES**

**UNIT CODE:** 0416 451 13A

**Relationship to Occupational Standards**

This unit addresses the unit of competency: Manage procurement for goods, works and services

**Duration of Unit:** 60 Hours

**Unit Description**

This unit covers the competencies required to offer project management services. It involves developing and preparing procurement plan and budget, participating in procurement procedures, contract negotiations, allocation and preparation of procurement report.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENT** | **DURATION** |
|  | Develop and prepare procurement plan and budget | 18 |
|  | Participate in procurement procedures, contract negotiations and allocation | 22 |
|  | Participate in preparation of procurement report | 20 |
|  | **TOTAL** | **60 HRS** |

**Learning Outcomes, Content and Methods of Assessment**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Methods of Assessment** |
| 1. Develop and prepare procurement plan and budget | * 1. Organizational procedures and relevant legislations in procurement      1. Public procurement oversight authority guidelines      2. Public financial management act,      3. Public audit act      4. Public Procurement and asset Disposal Act   2. Procurement of goods, works and services   3. Market survey and analysis   4. Price estimation   5. Sourcing strategies      1. Outsourcing      2. Cost      3. Quality      4. Location      5. Availability      6. Market demand and supply   6. Preparation of procurement budget   7. Presentation of budget and sourcing strategies | * Oral questioning * Written tests * Case study |
| 2. Participate in procurement procedures, contract negotiations and allocation of goods, works and services | 2.1 Meaning of contract and tender in procurement  2.2 Types of procurement  2.3 Procurement process  2.4 Types of tenders  2.5 Preparation of expression of interest documents and proposals  2.6 Contract negotiation and awarding  2.7 Relevant regulations in tendering and procurement process  2.8 Bidding processes | * Oral questioning * Written tests * Case study |
| 3. Participate in preparation of procurement evaluation report | 3.1 Procurement information gathering and organization  3.1.1 Tenders awarded and rejected  3.1.2 Duration of tendering  3.1.3 Names of directors and shareholders  3.1.4 Criteria of awarding tender  3.1.5 Ranking of evaluated bids  3.2 Procurement report preparation | * Oral questioning * Written tests * Case study |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Field work by the trainee
* Field trips
* Viewing of related videos
* Expert guest speakers
* Case studies

**Recommended Resources for 30 trainees**

* Computers with relevant e-procurement software and applications
* Communication devices
* Recorders
* Internet
* Cameras
* Stationery
* Transport means
* Sample documents
  + Expression of interest documents
  + Proposals
  + Relevant legislations

# **MODULE 3**

**PRINCIPLES OF COMMERCIAL LAW**

**UNIT CODE: 0421 451 07A**

**Duration of unit:** 110 hours

**Relationship to Occupational Standards**: This unit addresses the Unit of Competency: Apply Principles of Commercial Law

**UNIT DESCRIPTION**

This unit specifies the competencies required to demonstrate principles of commercial law. It involves analyzing the context of law, applying knowledge of court structures, applying the law of torts, the law of contract, the law of agency, the law of sale of goods, hire purchase contract, applying the law of negotiable instruments, the law of insurance, and the law of property.

**Summary of learning outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Demonstrate understanding of nature of law | 8 |
|  | Illustrate structure of court system in Kenya | 16 |
|  | Apply law of Tort | 10 |
|  | Apply law of Contract | 26 |
|  | Apply law of Agency | 8 |
|  | Apply law of Sale of Good | 8 |
|  | Apply hire purchase contracts | 6 |
|  | Apply law of negotiable instruments | 8 |
|  | Apply law of insurance | 8 |
|  | Apply law of property | 12 |
|  | **TOTAL** | **110** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning outcome** | **Content** | **Suggested Assessment Methods** |
| 1. Demonstrate understanding of nature of law | * 1. Nature of law   2. Purpose of law   3. Sources of law.      1. Constitution      2. Legislation      3. Common law      4. Equity      5. African customary law      6. Islamic law   4. Classifications of Commercial Law      1. Written and unwritten      2. National and international      3. Public and private      4. Substantive and procedural      5. Criminal and civil   5. Comparison between Law and Morality | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Illustrate structure of court system in Kenya | * 1. Court structure in Kenya   2. Composition of Kenyan courts      1. Supreme Court      2. Court of Appeal      3. High Court      4. Employment and Labour Relations Court      5. Environment and Land Court      6. Magistrates Court      7. Court Martial      8. Kadhis’ Court   3. Jurisdiction of Courts.      1. Original      2. Appellate      3. Territorial.      4. Pecuniary   4. Procedure of appointment and removal of magistrates and judges   5. Tribunals   6. The role of the JSC, AG, LSK, and ODPP in the Kenyan legal system. | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of Tort | * 1. Nature of tortuous liability   2. Tort, crime vs breach of contract   3. Capacity to sue /be sued by the law of tort.   4. Types of tort.      1. Negligence      2. Defamation      3. Nuisance      4. Trespass   5. General defences in tort   6. Elements of tort | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of Contract | * 1. Essential of a valid contract      1. Offer      2. Acceptance      3. Capacity      4. Intention      5. Consideration      6. Legality   2. Types of Contracts      1. Specialty/written      2. Simple contracts      3. Contracts under seal      4. Contracts requiring written evidence      5. Evidence in Writing   3. Methods of discharging a contract.      1. Express agreement      2. Performance      3. Breach      4. Impossibility/doctrine of frustration      5. Operation of law   4. Remedies of breach of a contract      1. Equitable doctrine of part performance   5. Terms of contract      1. Express      2. Implied | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of Agency | * 1. Formation and classification of agents      1. General agent      2. Special agent   2. Agents’ authority   3. Duties of agents      1. Performance      2. Obedience      3. Care and skill      4. Estoppel      5. Account      6. Personal performance   4. Rights of Agents      1. Rights to sue      2. Right to lien   5. Methods of terminating an agency.      1. Agreement      2. Withdraw      3. Death      4. Performance      5. Lapse of time      6. Insanity      7. Bankruptcy | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of Sale of Goods | * 1. Sale and agreement to sell   2. Capacity to buy and sell.   3. Terms of Sale of Goods.      1. Conditions      2. Warranties   4. Caveat emptor      1. meaning of caveat emptor      2. exception to caveat emptor   5. Factors affecting the transfer of title.   6. Rights of parties in the sale of goods.   7. Auction process.   8. Duties of the seller   9. Duties of the buyer. | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply hire purchase contracts. | * 1. Nature of Hire Purchase   2. Hire purchase agreement.   3. Conditions of Terminating Hire Purchase Agreement.   4. Completion of hire purchase agreement. | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of negotiable instruments | * 1. Negotiable instruments.      1. Cheques      2. Bill of exchange      3. Promissory note   2. Characteristics of negotiable instruments.   3. Elements of negotiable instruments. | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of insurance | * 1. Insurance contracts      1. Elements of insurance.   2. Principles of insurance.      1. Utmost good faith.      2. Subrogation      3. Indemnity      4. Proximate cause      5. Third party insurance      6. Re-instatement.      7. Salvage.      8. Contribution and appointment.   3. Formation of insurance contract   4. Requirement for insurance contract.   5. Discharge of insurance contract. | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Apply law of property. | * 1. Classifications of property      1. Real and personal      2. Movable      3. Immovable      4. Tangible      5. Intangible   2. Land interest.   3. Intellectual property.      1. Patents      2. Trademarks      3. Copyrights      4. Industrial designs | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |

**Suggested delivery methods**

1. Demonstration
2. Practical work by trainee
3. Fieldwork and benchmarking
4. Group discussions
5. Case studies
6. Role play

**List of Recommended Resources for 30 trainees**

**Tools, Equipment and Materials**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

1. Organization operating procedures
2. Industry/workplace codes of practice
3. Cooperative societies act
4. Sacco societies act
5. Text books
6. Cooperative society journals
7. Magazines
8. E-learning resources
9. Occupational standards

**MANAGEMENT SKILLS**

**UNIT CODE: 0415 451 06A**

**Duration of Unit: 70 Hours**

**Relationship to occupational standards**

This unit addresses the unit of competency: Apply Management Skills.

**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.

**Summary of learning outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Apply planning principle | 20 |
|  | Apply organizing principle | 18 |
|  | Apply directing principle | 18 |
|  | Apply coordinating principle | 14 |
|  | **TOTAL** | **70 HRS** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| 1. Apply planning principle | * 1. Goals and objectives      1. Innovation and adaptability      2. Customer satisfaction      3. Employee engagement and development      4. Achieve sustainable growth      5. Ensure financial growth and profitability      6. Identify opportunities for growth and diversification   2. Work plans      1. Creating timelines      2. Break down the project into specific tasks      3. Identifying resources required      4. Identifying potential risks and challenges      5. Process for seeking approvals   3. Monitoring of work progress   4. Principles of planning      1. Vision and mission      2. Data-driven decision making      3. Flexible plans      4. Transparency in decision making      5. Fair and equitable decision making   5. Steps in planning process   6. Barriers to planning   7. Guidelines to avoiding barriers   8. Management by objectives   9. Types of plans      1. Tactical plans      2. Strategic plans      3. Operational plans | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 1. Apply organizing principle | * 1. Office goals and objectives   2. Office tasks and responsibilities   3. Monitoring of progress   4. Process of organization   5. Organizing components   6. Authority and responsibility   7. Organization structures      1. Product line structure      2. Matrix structure      3. Geographical-based structure   8. Delegation   9. Centralization and decentralization   10. Principles of organization | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 1. Apply directing principle | * 1. Orders and instructions   2. Staff Supervision   3. Exchange of opinions and ideas   4. Characteristics of successful leaders   5. Leadership roles   6. Theories   7. Leadership styles      1. Bureaucratic leadership      2. Charismatic leadership      3. Situational leadership      4. Autocratic leadership   8. Communication structures | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 1. Apply coordinating principle | 4.1 Work schedules creation  4.2 Roles and responsibilities  4.3 Rewards and recognition | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |

**Suggested Methods of Instruction**

* Demonstration
* Practical work by trainee
* Fieldwork and benchmarking
* Group discussions
* Role plays
* Case studies

**Recommended Resources for 30 trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources
* Occupational standards

**BASIC MATHEMATICS AND STATISTICS**

**UNIT CODE:** 0413 451 08A

**UNIT DURATION:** 120 Hours

**Relationship to Occupational Standards**: This unit addresses the Unit of Competency: Apply Business Mathematics and Statistics

**Unit Description**

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

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Work-out commercial mathematics | 14 |
|  | Apply statistical equations | 14 |
|  | Apply statistical matrices | 22 |
|  | Carry out elementary statistics | 10 |
|  | Carry out descriptive statistics | 19 |
|  | Apply set theory | 9 |
|  | Apply basic probability theory | 14 |
|  | Use index numbers | 7 |
|  | **TOTAL** | **120 HRS** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| 1. Work-out commercial mathematics | 1.1 Types of discounts  1.1.1 Cash discount  1.1.2 Trade discount  1.1.3 Quantity discount  1.2 Commissions  1.3 Methods of calculating wages  1.3.1 Piece rate  1.3.2 Hourly rate  1.4 Computing wages and salaries  1.5 Simple and compound interest  1.6 Profit margin and Mark-ups  1.7 Gross pay and net pay calculation  1.8 Depreciation and appreciation of assets  1.9 Determining hire purchase price  1.10 Foreign exchange transactions | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 2. Apply statistical equations | 2. 1 Solving linear equations with one or more variables  2.2 Solving quadratic equations  2.2.1 Formula method  2.2.2 Factorization  2.3 Simultaneous equations  2.3.1 Substitution method  2.3.2 Elimination method  2.3.3 Matrix method  2.4 Breakeven analysis  2.5 Calculus  2.5.1 Differentiation  2.5.2 Integration  2.6 Total revenue, total cost and profit equations formulation | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 3. Apply statistical matrices | 3.1 Introduction to matrices  3.2 Operations of matrices  3.2.1 Addition  3.2.2 Subtraction  3.2.3 Division  3.2.4 Multiplication  3.3 Solving a 2\*2 matrix  3.4 Determinants of a 2\*2 matrix  3.5 Inverse of a 2\*2 matrix  3.6 Application of matrices in solving business operations | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 4. Carry out elementary statistics | 4.1 Introduction to data collection  4.2 Methods of data collection  4.2.1 Primary  4.2.2 Secondary Data  4.3 Sampling techniques  4.3.1 Probability  4.3.2 Non-probability  4.4. Methods of data presentation  4.4.1 Tables and diagrams  4.4.1.1.Frequencydistribution  table  4.4.1.2.Bar charts  4.4.1.3 Pie charts  4.4.1.4 Histogram  4.4.1.5 frequency polygons  4.4.2 Types of graphs  4.4.2.1 Basic time series  graphs  4.4.2.2 z-charts  4.4.2.3 Lorenz curves  4.4.2.4 Semi-log graphs  4.5 Cumulative frequency curves (OGIVE) | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 5. Carry out descriptive statistics | 5.1 Measures of central tendency  5.1.1 Mean  5.1.2 Mode  5.1.3 median  5.2 Measures of dispersion  5.2.1 Variance  5.2.2 Standard deviation  5.3 Measures of skewness and kurtosis | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 6. Apply set theory | 6.1 Basic set definitions  6.1.1.Set  6.1.2 Element  6.1.3 Empty set  6.2 Operations on sets  6.2.1 Union  6.2.2 Intersection  6.2.3 Difference  6.2.4 Symmetric difference  6.3 Venn diagrams  6.4 Application of set theory | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 7. Apply basic probability theory | 7.1 Probability events  7.2 Types of events  7.2.1 Simple  7.2.2 Compound  7.2.3 Mutually exclusive  7.2.4 Independent  7.2.5 Dependent  7.3 Rules of probability  7.4 Bayes’ Theorem  7.5 Drawing probability trees  7.6 Application of probability | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |
| 8. Use index numbers | 8.1 Formulae for computing index numbers  8.2 Computation of index numbers  8.2.1 Laspeyre’s  8.2.2 Paasche’s  8.2.3 Fisher’s ideal  8.2.4 Marshal  8.3 Application of index numbers in decision making | * Practical assessment * Project * Portfolio of evidence * Third party reports * Written tests * Oral questions |

**Suggested Delivery Methods**

* Demonstration
* Practical work by trainee
* Fieldwork and benchmarking
* Group discussions

**List of Recommended Resources for 30 trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
| 1. | Charts | * Flip Charts | 5 | 1:6 |
| **B** | **Learning Facilities & Infrastructure** | | | |
| 2. | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
| 3. | Internet Connection | WI-FI, Dial-Up, Cable, Fixed-wireless, | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
| 4. | Markers | whiteboard markers and permanent markers | 5 | 1:6 |
| 5. | Stationery | Printing Papers,  Foolscaps | 5 reams | 1:6 |
| 6. | Files / folders |  | 30 | 1:1 |
| 7. | Flash disks |  | 5 | 1:6 |
| **D** | **Tools And Equipment** | | | |
| 8. | Computers/Laptops | Any model | 30 | 1:1 |
| 9. | Projector | LED.LCD, Laser | 1 | 1:30 |
| 10. | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| 11. | Staplers |  | 2 | 1:15 |
| 12. | Paper punch |  | 2 | 1:15 |
| 13. | Metallic cabinet |  | 1 | 1:30 |
| 14. | Scanner |  | 2 | 1:15 |
| 15. | Printer |  | 1 | 1:30 |
| 16. | Print toners |  | 2 | 1:15 |
| 17. | Shredding machine |  | 1 | 1:30 |

**Reference**

Saleemi, N.A. (2008). Business calculations and statistics simplified (Revised ed.). N.A. Saleemi Publishers.

**PROJECT ENVIRONMENTAL MANAGEMENT**

**UNIT CODE:** 0522 451 14A

**Duration of unit:** 120 hours

**Relationship to Occupational Standards**

This unit addresses the unit of competency: Manage project environment

**Unit Description**

This unit covers the competencies required to manage project environment. It involves identifying project environment, performing project environment analysis, developing project environment monitoring plan and monitoring project environment

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Identify project environment | 30 |
|  | Perform project environment analysis | 30 |
|  | Develop project environment monitoring plan | 36 |
|  | Monitor project environment | 24 |
|  | **TOTAL** | **120 HOURS** |

**Learning Outcomes, Content and Methods of Assessment**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Methods of Assessment** |
| 1. Identify project environment | * 1. Project’s cultural environment   2. Project’s social environment   3. Project’s physical environment   4. Project’s organizatioanl environment   5. Project’s political environment   6. Project’s legal environment   7. Stakeholders of the project | * Oral questioning * Written tests * Case study |
| 1. Perform project environment analysis | * 1. Project environment analysis      1. organizational cultural norms and behaviours      2. social context      3. political climate      4. physical environment      5. economic environment      6. government or industry standards      7. organizational standard processes      8. organizational policies      9. organizational knowledge bases      10. organizational templates      11. internal databases      12. organizational structure      13. infrastructure      14. stakeholder risk tolerance      15. organizational politics and power   2. Stakeholder involvement   3. Environment analysis documentation | * Oral questioning * Written tests * Case study |
| 1. Develop project environment monitoring plan | * 1. Components of an environmental management plan   2. Tools for monitoring project environment   3. Methods of monitoring project environment | * Oral questioning * Written tests * Case study Case study |
| 1. Monitor project environment | * 1. Monitoring tools   2. Monitoring the environment   3. Monitoring report | * Oral questioning * Written tests * Case study |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Group discussion
* Field trips
* Viewing of related videos and models
* Dual training

**Recommended Resources for 30 trainees**

* Computers
* Projectors
* Communication devices
* Recorders
* Internet
* Cameras
* Stationery
* Transport means
* Meeting venues

# **MODULE 4**

## **PRINCIPLES OF ECONOMICS**

**UNIT CODE: 0311 551 10A**

**Duration of unit:** 120 hours

**Relationship to occupational standards**

This unit addresses the unit of competency: Apply Economic Skills.

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply economic skills. It involves; demonstrating understanding of economic concepts, applying demand concept in market analysis, applying supply concept in market analysis, setting prices of the products, applying theory of consumer behavior, applying production theory, applying theory of costs, differentiating market structures, determining national income, apply understanding of money and banking, apply understanding of inflation and unemployment and apply understanding of international trade.

**Summary of learning outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **Elements** | **Duration (HRS)** |
|  | Apply fundamental economics concepts | 10 |
|  | Apply demand and supply in market analysis | 10 |
|  | Apply Consumer Behavior Theory | 18 |
|  | Apply Production Theory | 18 |
|  | Apply Cost Theory | 16 |
|  | Understand Market Structures | 12 |
|  | Apply understanding of inflation and unemployment | 12 |
|  | Apply understanding of money and banking | 8 |
|  | Apply understanding of National income. | 8 |
|  | Apply understanding of international trade | **8** |
|  | **TOTAL** | **120HRS** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning outcomes** | **Content** | **Suggested Assessment Methods** |
| **1.** Apply fundamental of Economic Concepts | * 1. Economic concepts.      1. Economic resources      2. Human wants      3. Scarcity and choice      4. Opportunity cost      5. Production possibility curves/frontiers   2. Economic methodology   3. Scope of economic resources   4. Economic systems.   5. Effective resource utilization. | * Case studies * Written assessment * Oral assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 1. Apply demand and supply in market analysis | * 1. Market demand and supply dynamics.   2. Factors affecting demand and supply.   3. Demand and supply curves   4. Elasticity of demand and supply. | * Case studies * Practical * Written assessment * Oral assessment * Third-party report * Observation * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 1. Apply consumer behaviour theory | * 1. Consumer behaviour approaches.   2. Consumer utility      1. Marginal utility      2. Law of diminishing   3. consumer equilibrium   4. Indifference curves | * Case studies * Practical * Written assessment * Oral assessment * Third-party report * Observation * Demonstration * Projects * Group Discussion * Portfolio of evidence * Case studies * Practical * Written assessment * Demonstration * Projects * Portfolio of evidence |
| 1. Apply production theory | * 1. Mobility of Factors of production and their rewards   2. Output units determination   3. Stages of production 4.3.1 Primary      1. Secondary      2. Tertiary   4. Long run and short run production period   5. Direct and Indirect Production   6. Merits and demerits of direct and indirect production   7. Division of labour and specialization. | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 1. Apply cost theory | * 1. Classification of production costs      1. Fixed costs      2. Variable costs      3. Total cost      4. Opportunity costs      5. Marginal cost   2. short run costs analysis   3. long run costs analysis   4. Cost curves analysis.   5. Optimal size of the firm.      1. Economies of scale. | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 1. Differentiate market Structures | * 1. Market structures determination   2. Market output   3. Market Prices.   4. Market structures selection      1. Perfect competition      2. Monopoly      3. Monopolistic      4. Oligopoly      5. Duopoly | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 7.Determine national income | * 1. Concept of national income      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   2. Methods used to measure national income      1. Income approach      2. Output approach      3. Expenditure approach   3. Problems of national income   4. Importance of national income statistics   5. National income equilibrium. | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 8. Understand Money and Banking | * 1. Functions of money   2. Characteristics of money   3. Financial institutions   4. Functions of central bank and commercial bank   5. Functions of non-banking financial   institutions | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 9. Determine Inflation and unemployment | * 1. Types of inflation      1. Cost push      2. Demand pull   2. Causes of inflation   3. Effects of inflation   4. Measures to control inflation      1. Fiscal policy      2. Monetary   5. Direct intervention      1. Causes of unemployment      2. Unemployment control measures | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |
| 10. Understand InternationalTrade | * 1. Concept of international trade;      1. Meaning,      2. Advantages and disadvantages.   2. International balance of payments.      1. International Balance of trade.      2. International Terms of trade. | * Case studies * Practical * Written assessment * Demonstration * Projects * Group Discussion * Portfolio of evidence |

**Suggested delivery methods**

* Demonstration
* Practical work by trainee
* Fieldwork and benchmarking
* Group discussions
* Case studies
* Role play

**List of Recommended Resources for 30 trainees**

**Tools, Equipment and Materials**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

## **RESEARCH STUDY**

**UNIT CODE: 0416 551 09**A

**Duration of unit:** 80 hours

**Relationship to Occupational Standards**; this unit addresses the Unit of Competency: conduct research project

**UNIT DESCRIPTION**

This unit covers the competencies required to carry out research study. It includes writing research study introduction, reviewing research literature, designing research study methodology, analyzing research study findings, summarizing research study findings and compiling research report.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Write research study introduction | 12 |
|  | Review research literature | 10 |
|  | Design research study methodology | 14 |
|  | Analyze study findings | 14 |
|  | Summarize research study finding | 15 |
|  | Compile research report | 15 |
|  | **TOTAL** | **80** |

**Learning Outcomes, Content and Suggested Assessment Methods**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| 1. Write research study introduction | * 1. Developing research title.   2. Research variables      1. Independent variables      2. Dependent variables      3. Moderating variables   3. Formulate research objectives   4. Formulate research questions   5. Background to the study      1. Global      2. Regional      3. Local   6. Statement of the problem   7. Significance of the study   8. Scope of the study      1. Study focus      2. Study population      3. Study variables   9. Limitations of the study | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Research literature | * 1. Relevant theories of the study   2. Empirical literature review   3. Conceptual framework   4. Research gaps | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Design research study methodology | * 1. Research designs   2. Target population      1. Finite      2. Infinite   3. Sampling techniques      1. Probability      2. Non-probability   4. Data collection tools      1. Questionnaires      2. Interview schedules      3. Observations   5. Data analysis techniques      1. Quantitative      2. Qualitative   6. Data presentation methods      1. Tables      2. Charts | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Analyze study findings | * 1. Response rate   2. Data analysis techniques   3. Data interpretation   4. Data presentation | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Summarize research study findings | * 1. Study findings   2. Research recommendations   3. Suggestions for further studies | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |
| 1. Compile research report | * 1. Preliminary review   2. Organization of research report      1. Cover page      2. Declaration      3. Dedication   3. List of references   4. Appendices      1. Letter      2. Introduction      3. Data collection tools      4. Work plan   5. Research report proofreading      1. Change of tenses from future tense to past tense      2. Appropriate line spacing      3. Appropriate font style and font size   6. Report binding      1. Spiral      2. Case/hard cover | * Oral questions * Written assessment * Portfolio of Evidence * Practical assessment * Third party report |

**Suggested delivery methods**

* Demonstration
* Practical work by trainee
* Fieldwork and benchmarking
* Group discussions
* Case studies
* Role play

**List of Recommended Resources for 30 trainees**

**Tools, Equipment and Materials**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** | | | |
|  | Charts | * Flip Charts * Rules and Regulations | 5 | 1:6 |
|  | External Storage Media | Flash disks, Compact Disks; Re-Writable | 5 | 1:6 |
|  | Smart board (Where Applicable) | LCD or projector | 1 | 1:30 |
|  | Whiteboard | Glass, melamine, porcelain | 1 | 1:30 |
| **B** | **Learning Facilities & Infrastructure** | | | |
|  | Lecture/Theory Room | (9\* 8 sq. metres) | 1 | 1:30 |
|  | Internet Connection | System | 1 | 1:30 |
| **C** | **Consumable Materials** | | | |
|  | Markers | Whiteboard markers and permanent Markers | 5 | 1:6 |
|  | Printing Papers | Sizes A4, A3, A2 etc | 5 reams | 1:6 |
| **D** | **Tools And Equipment** | | | |
|  | Desktops | Any model | 30 | 1:1 |
|  | Printer | Inkjet, LaserJet | 2 | 1:15 |
|  | Computers Software: | •Windows/Linux/Macintosh Operating System  •Microsoft Office Software  •Google Workspace Account  Antivirus Software | 1 | 1:1 |

**References**

* Organization operating procedures
* Industry/workplace codes of practice
* Cooperative societies act
* Sacco societies act
* Text books
* Cooperative society journals
* Magazines
* E-learning resources

## **PROJECT PLANNING AND DESIGN**

**UNIT CODE:** 0413 551 15A

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Manage project design and planning.

**Duration of Unit:** 80 Hours

**Unit Description**

This unit covers the competencies required to managing project planning and design. It involves formulating project planning and design, constituting project planning and design team, developing project plans, developing project activity schedules and developing project budget estimates.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| S.NO | ELEMENTS | DURATION(HRS) |
|  | Formulate project plan and design tools | 10 |
|  | Constitute project plan and design team | 10 |
|  | Developing project plans | 12 |
|  | Develop project activity schedules | 12 |
|  | Procure project finances | 14 |
|  | Develop project budget estimates | 22 |
|  | **TOTAL** | **80 HRS** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested**  **Assessment Methods** |
| --- | --- | --- |
| 1. Formulate project plan and design tools | 1. Meaning of a project planning and design 2. Purpose of a project planning and design 3. Project planning and design tools    * 1. Network diagrams      2. Gantt charts      3. Responsibility matrix      4. Activity schedules      5. Work breakdown structure    1. Approval of project tools | * Observation * Written assessment * Oral assessment * Practical assessment |
| 1. Constitute project plan and design team | 1. Methods of recruitment and selection 2. Types of interviews 3. Induction process 4. Training and development 5. Remuneration and motivation | * Carrying out interviews * Direct observation * Oral questioning |
| 1. Develop project plans | 1. Meaning of implementation plan 2. Purpose of implementation plan 3. Factors to consider in preparation of implementation plan 4. Resource management procedures 5. Preparation of a resource management schedule 6. Risk management plan 7. Risk matrix 8. Risk mitigation strategies 9. Preparation of work plans e.g.   3.9.1 Gantt charts  3.9.2 Work breakdown structure(WBS)   * + 1. Implementation matrix   3.10 Stakeholders participation in approval of implementation plan | * Direct observation * Oral questioning * Written tests |
| 1. Develop project activity schedules | 1. Identify project activities 2. Activity relationships and dependencies. 3. Sequencing, CPM 4. Finish-to-Start, 5. Start-to-Start, 6. Finish-to-Finish or Start-to-Finish. 7. Project scheduling toolsI.e.   4.4.1 Microsoft Project,  4.4.2 Monday.com  4.4.3 Asana   1. Develop project activity schedule | * Project activity schedule * Oral questioning   Written tests |
| 1. Procure project finances | 1. Meaning of project finance 2. Sources of project finance 3. Types of project finance e.g. donations 4. Selection of a project financier 5. Meaning of a project financing structure 6. Factors to consider in development of a project financing structure 7. Steps in development of a project financing structure 8. Project fundraising 9. Proposal writing | * Proposal writing * Observation * Portfolio of Evidence * Project |
| 1. Develop project budget estimates | * 1. Budget items   2. Methods of budgeting      1. Balanced budgets      2. Capital budgets      3. Operating budgets      4. Cash budget      5. Zero Budgeting      6. Activity Based Budgeting   3. procedure for budget approval   4. methods of controlling cost   5. cost control measures | * Actual budget * Direct observation * Oral questioning * Written tests |

**Suggested Methods of Instruction**

* + Instructor-led facilitation using active learning strategies
  + Demonstration by trainer
  + Practical work by trainees
  + Viewing of related videos
  + Group discussions
  + Project
  + Role play
  + Case study

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** |  |  |  |
|  | Textbooks |  | 5 pcs | 1:6 |
|  | Magazines |  |  |  |
|  | Project management Journals |  |  |  |
|  | PowerPoint presentations | For trainer’s use |  |  |
|  | Projector |  | 1 | 1;30 |
|  | Whiteboard |  | 1 | 1;30 |
|  | Report writing templates |  |  |  |
|  | Rolls flip charts |  | 1 | 1;30 |
|  | Assorted color of whiteboard markers | For trainers Use |  |  |
| **B** | **Learning Facilities & infrastructure** |  |  |  |
|  | Lecture/theory room |  | 1 | 1:30 |
|  | Meeting venues |  | 1 | 1:30 |
| **C** | **Consumable materials** |  |  |  |
|  | Assorted whiteboard markers |  | 30 | 1:1 |
|  | Internet connection |  | 200 mbps | - |
|  | Antivirus Software |  |  | - |
|  | Actual budgets (Manilla papers) |  | Enough | - |
|  | External storage media |  | 1 tb | - |
| **D** | **Tools and Equipment** |  |  |  |
|  | Printers |  | 2 pcs | 2:30 |
|  | Computers | With Windows /Linux/Macintosh Operating System, Microsoft Office Software, Google Workspace Account, Antivirus Software | 30pcs | 1:1 |

## **PROJECT IMPLEMENTATION**

**UNIT CODE:** 0413 551 16A

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Manage project implementation

**Duration of Unit:** 50 hours

**Unit Description**

This unit describes competencies required to managing project implementation. It involves constituting project implementation team, performing project resource acquisition, managing project resources and monitoring project implementation.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| S.NO | ELEMENTS | DURATION (HRS) |
|  | Identify and manage project implementation team | 10 |
|  | Acquire and manage project resources | 12 |
|  | Project take off and Commissioning | 16 |
|  | Monitor and control the project activities | 12 |
|  | **TOTAL** | **50 HRS** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| 1. Constituting project implementation team | 1. Meaning of a project implementation team 2. Purpose and importance of a project implementation team 3. Project implementation team organization e.g. skilled, unskilled 4. Delegation and supervision of responsibilities 5. Project team feedback report 6. Project implementation team meetings co-ordination 7. Project implementation team   training and motivation | * Oral questioning * Written tests * Case study |
| 1. Performing project resource acquisition | 1. Meaning of project resources 2. Types of project resources 3. Purpose and importance of project resources 4. Resource management schedules 5. Format   Components | * Oral questioning * Written tests Case study |
| 1. Project take off and Commissioning | * 1. Procedures for take-off and commissioning.   2. Take off and commissioning duties. |  |
| 1. Monitoring project implementation | * 1. Meaning of project monitoring and control importance of project activities monitoring and control   2. Monitoring tools and methods   4.3.1Development and use of Logical framework   * 1. Project activities classification and timelines e.g. Work breakdown structure   2. Earned value analysis   3. Progressive quality and standards analysis   4. Project progressive reports | * Oral questioning * Written tests * Case study |

**Suggested Methods of Instruction**

* + Instructor led facilitation of theory
  + Demonstration by trainer
  + Case studies
  + Group discussion
  + Field trips
  + Viewing of related videos and models
  + Dual training

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** |  |  |  |
|  | Textbooks |  | 5 pcs | 1:6 |
|  | Magazines |  |  |  |
|  | Project management Journals |  |  |  |
|  | PowerPoint presentations | For trainer’s use |  |  |
|  | Projector |  | 1 | 1;30 |
|  | Whiteboard |  | 1 | 1;30 |
|  | Report writing templates |  |  |  |
|  | Rolls flip charts |  | 1 | 1;30 |
|  | Assorted color of whiteboard markers | For trainers Use |  |  |
| **B** | **Learning Facilities & infrastructure** |  |  |  |
|  | Lecture/theory room |  | 1 | 1:30 |
|  | Meeting venues |  | 1 | 1:30 |
| **C** | **Consumable materials** |  |  |  |
|  | Assorted whiteboard markers |  | 30 | 1:1 |
|  | Internet connection |  | 200 mbps | - |
|  | Antivirus Software |  |  | - |
|  | Printing Papers |  | Enough | - |
|  | External storage media |  | 1 tb | - |
| **D** | **Tools and Equipment** |  |  |  |
|  | Printers |  | 2 pcs | 2:30 |
|  | Computers | With Windows /Linux/Macintosh Operating System, Microsoft Office Software, Google Workspace Account, Antivirus Software | 30pcs | 1:1 |

# **MODULE 5**

## **PROJECT MONITORING AND EVALUATION**

**UNIT CODE:** 0413 551 17A

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Monitor and Evaluate Projects

**Duration of Unit:** 90 hours

**Unit Description**

This unit describes competencies required to monitor and evaluate projects. It involves constituting M&E team, reviewing project performance indicators, developing project monitoring and evaluation tools, tracking project progress and assessing project results.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION(HRS)** |
|  | Review project design | 8 |
|  | Identify performance indicators | 12 |
|  | Develop M & E System | 8 |
|  | Develop M&E methods and tools | 14 |
|  | Budget for M&E | 14 |
|  | Identify M&E project team | 8 |
|  | Conduct monitoring & Evaluation | 10 |
|  | Tracking project progress | 8 |
|  | Assessing project results. | 10 |
|  | **TOTAL** | **90 HRS** |

**Learning Outcomes, Content, and Suggested Assessment Methods**

| **Learning Outcome** | **Content** | **Suggested Assessment Methods** |
| --- | --- | --- |
| 1. Constitute M&E team | 1. Methods selection 2. Job design    * 1. Duties and responsibility      2. Job descriptions      3. job specification    1. Training M&E       1. Types of Monitoring       2. Types of evaluation       3. Importance of M&E       4. M&E tools | * Oral questioning * Written tests |
| 1. Review project performance indicators | 1. Performance indicators 2. Types of indicators 3. Methods of measuring performance indicators 4. Process of developing indicators 5. Qualities of good indicators   Use of tools i.e. morning dough, tensor board, ML flow. | * Practical use of PERT tools * Oral questioning * Written tests |
| 1. Develop M&E methods and tools | 1. Meaning of M&E tools 2. Types of M&E tools    * 1. Questionnaires      2. Interview guides      3. Observation guidelines    1. Development of M&E tools    2. Application of M&E tools | * Actual M&E tools * Oral questioning * Written tests |
| 1. Tracking project progress | 1. Monitoring Data collection, 2. Tools and techniques 3. Monitoring Data analysis 4. Monitoring Report writing 5. Dissemination of report 6. Real-Time Monitoring & Data Collection | * Oral questioning * Written tests * Case study |
| 1. Assess project results | 1. Evaluation Data collection, 2. Tools and techniques 3. Evaluation Data analysis 4. Evaluation Report writing 5. Dissemination of report 6. Real-Time Monitoring & Data Collection | * Oral questioning * Written tests |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Field work by the trainee
* Field trips
* Viewing of related videos
* Expert guest speakers
* Case studies

**Recommended Resources for 30 Trainees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S/No.** | **Category/Item** | **Description/ Specifications** | **Quantity** | **Recommended Ratio**  (Item: Trainee) |
| **A** | **Learning Materials** |  |  |  |
|  | Textbooks |  | 5 pcs | 1:6 |
|  | Magazines |  |  |  |
|  | Project management Journals |  |  |  |
|  | PowerPoint presentations | For trainer’s use |  |  |
|  | Projector |  | 1 | 1;30 |
|  | Whiteboard |  | 1 | 1;30 |
|  | Sample documents  Project plan, Proposals, Sample M&E reports, Relevant legislations and M&E guides |  |  | 3:30 for each |
|  | Rolls flip charts |  | 1 | 1;30 |
|  | Assorted color of whiteboard markers | For trainers Use |  |  |
| **B** | **Learning Facilities & infrastructure** |  |  |  |
|  | Lecture/theory room |  | 1 | 1:30 |
|  | Meeting venues |  | 1 | 1:30 |
| **C** | **Consumable materials** |  |  |  |
|  | Assorted whiteboard markers |  | 30 | 1:1 |
|  | Internet connection |  | 200 mbps | - |
|  | Antivirus Software |  |  | - |
|  | Printing Papers |  | Enough | - |
|  | External storage media |  | 1 tb | - |
| **D** | **Tools and Equipment** |  |  |  |
|  | Printers |  | 2 pcs | 2:30 |
|  | Recorders | For trainees |  | 1:1 |
|  | Cameras | For Trainees |  | 1:1 |
|  | Mobile phones |  | 10 | 10:30 |

## **PROJECT AUDITING AND REVIEW**

**UNIT CODE:** 0413 551 18A

**Relationship to Occupational Standards**

This unit addresses the unit of competency: audit and review Projects

**Duration of Unit: 60** hours

**Unit Description**

This unit covers the competencies required to audit and review projects. It involves developing audit plan, developing audit tools, developing audit budget, conducting audit, following up on audit recommendations and conducting project review.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| S.NO | ELEMENTS | DURATION (HRS) |
|  | Develop audit plan | 6 |
|  | Develop audit tools | 12 |
|  | Develop audit budget | 12 |
|  | Conduct audit | 16 |
|  | Follow-up on audit recommendations | 8 |
|  | Conduct project review | 6 |
|  | **TOTAL** | **60hrs** |

**Learning Outcomes, Content and Methods of Assessment**

| **Learning Outcome** | **Content** | **Methods of Assessment** |
| --- | --- | --- |
| * + - 1. Develop audit plan | * 1. Audit objective defination   2. Audit scope defination   3. Audit criteria      1. Project plan      2. Project deliverables      3. Organisation’s standard operating procedures and guidelines      4. Legal and regulatory requirements      5. International standards IFRS (International Financial Reporting Standards)      6. Specific donor or financier standards or requirements   4. Composition of audit team   5. Audit team appointment   6. Roles and responsibilities of the audit team | * Oral questioning * Written tests |
| * + - 1. Develop audit tools | 2.1 Types of audit tools  2.1.1Questionnaires   * + 1. Interview guides     2. Observation guidelines     3. Documentation templates   1. Development of audit tools   2. Application of audit tools | * Oral questioning * Written tests * Case study |
| * + - 1. Develop audit budget | 3.1 Meaning of budget  3.2 Budgetary/expenditure items   * 1. Criteria for allocation of funds   2. Budget preparation   3. Preparation of audit budget versus actual analysis report | * Oral questioning * Written tests * Case study |
| * + - 1. Conduct audit | * 1. Audit procedures      1. Audit meetings      2. Document review      3. Interviews      4. Observations   2. Substantive procedures      1. Document review      2. Interviews   3. Final analytics   4. Close out procedures/ conclusion   5. Audit review meetings   6. Entrance meetings   7. Show-me meetings   8. Progress meetings   9. Exit meetings   10. Audit report writing   11. Financial statements   12. Audit opinion   13. Management letter/ internal control report | * Oral questioning * Written tests * Case study |
| * + - 1. Follow-up on audit recommendations | * 1. Audit recommendation implementation schedule   2. Monitoring of implementation recommendation   3. Impact of implementations | * Oral questioning * Written tests * Case study |
| * + - 1. Conduct project review | * 1. Types of project review   6.1.1 Project phase review  6.1.2 End of project review   * 1. Project review objectives   2. Project review parameters   6.3.1 Project schedule/timelines  6.3.2 Scope  6.3.3 Budget  6.3.4 Deliverables  6.3.5 Risk control and mitigation   * 1. Project review team   6.4.1 3rd party  6.4.2 Project team  6.4.3 Peer review team   * 1. Project review stakeholders identification   2. Project review plan   3. Project review tools and methodology   4. Conducting of project review   5. Documentation and dissemination pf results | * Oral questioning * Written tests * Case study |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Field work by the trainee
* Field trips
* Viewing of related videos
* Expert guest speakers
* Case studies

**Recommended Resources for 30 trainees**

* Computers with relevant software and applications
* Communication devices
* Recorders
* Internet
* Cameras
* Stationery
* Transport means
* Sample documents
  + Project plan
  + Proposals
  + Sample M&E reports
  + Relevant legislations and M&E guides

## **PROJECT CLOSURE**

**UNIT CODE:** 0413 551 19A

**Relationship to Occupational Standards**

This unit addresses the Unit of Competency: Manage project closure

**Duration of Unit:** 70 hours

**Unit Description**

This unit covers the competencies required to manage project closure. It involves, planning for project closure review meeting, completing documentation and signing off, reviewing project sustainability ,releasing resources, archiving project documents, preparing project closure reports, preparing project transition and celebrating success.

**Summary of Learning Outcomes**

|  |  |  |
| --- | --- | --- |
| **S.NO** | **ELEMENTS** | **DURATION (HRS)** |
|  | Plan for Project Closure Review Meeting | 8 |
|  | Complete documentation and Signoff | 6 |
|  | Review project sustainability | 8 |
|  | Release Resources | 10 |
|  | Archive Project Documents | 8 |
|  | Prepare project closure reports | 12 |
|  | Prepare project transition | 12 |
|  | Celebrate Success | 6 |
|  | **TOTAL** | **70 HRS** |

**Learning Outcomes, Content and Methods of Assessment**

|  |  |  |
| --- | --- | --- |
| **Learning Outcome** | **Content** | **Methods of Assessment** |
| 1. Plan for project closure review meeting | * 1. Project closure requirnments   2. Project review   3. Types of meetings   4. Methods of documentation of lessons learnt | * Oral questioning * Written tests |
| 1. Complete documentation and signoff | * 1. Documents required for project closure   2. Verification of closure documents   3. Handling claims and discrepanciess   4. Project management valuation | * Oral questioning * Written tests * Third party reports |
| 1. Review project sustainability plan | * 1. project sustainability measures   2. Components of a sustainability plan   3. Format of a sustainability plan   4. Preparation of a sustainability plan   5. Application/ implementation of sustainability plan | * Oral questioning * Written tests |
| 1. Release project resources | * 1. project release checklist   2. disegangement of project team   3. disposal of projects assets   4. resource release sign off | * Oral questioning * Written tests |
| 1. Archive project documents | * 1. Record retention and data protection requirements   2. Core documents to be archeived   3. Methods of document archival   4. Access rights and user privileges | * Oral questioning * Written tests |
| 1. Prepare project closure reports | * 1. Format of project closure report   2. Components of project closure report   3. Methods of dissemination of project closure report | * Oral questioning * Written tests |
| 1. Prepare project transition | * 1. Transition plan   2. maintainance and support requirment plan   3. Patent   4. Copyright   5. intelluctual property | * Oral questioning * Written tests |
| 1. Celebrate success | * 1. Methods of debriefing project team   2. Benefits of debriefing project team   3. Project team rewards | * Oral questioning * Written tests |

**Suggested Methods of Instruction**

* Instructor led facilitation of theory
* Demonstration by trainer
* Group discussion
* Field trips
* Viewing of related videos and models
* Dual training

**Recommended Resources**

* Computers
* Projectors
* Communication devices
* Recorders
* Internet
* Cameras
* Stationery
* Transport means
* Meeting venues