

Learning Assessment Guide

Unit Standard 11646 – Version 4

Prepare business information for management

Level 5 – 5 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- questions for you to answer which demonstrate your skill and knowledge in preparing business information for management. These relate to two requests for business information
- workplace documents, in the form of two prepared pieces of business information
- verification form(s) to be completed by the person or people who requested the business information
- assessment results that the assessor will use to assess your competence.

The tasks in this assessment are designed to show your assessor that you can:

- 1 establish management information needs
- 2 identify and research information sources
- 3 select, collate, and process information, and
- 4 produce business information for management.

Assessment Task One – Elements 1, 2, 3 and 4

This assessment task is designed to assess your ability to:

- establish management information needs,
- identify and research information sources,
- select, collate, and process information, and
- produce business information for management.

Task one instructions

Using two different management requests for business information which you have received, you should answer the questions below in relation to each request.

Information may include but is not limited to - business reports, statistical information, financial information, graphical information, computer generated spreadsheets, database reports, word-processed information.

Your answers can be handwritten or typed and should be attached to this Learning Assessment Guide. At the completion of Task one you will have two documents that provide answers to the questions below.

This is a Level 5 unit standard worth 5 credits, therefore it is expected that your answers show a significant amount of depth and detail. Your answers should be able to demonstrate that you can determine appropriate methods and procedures for the tasks, and take responsibility for the nature of the outcomes.

Task One Questions

1. What is the request for business information you have been given? Provide an outline of the request, including all the details given to you.

Establish management information needs.

- How did you establish the information needs and priorities of the intended recipients, in terms of information purpose, scope, structure, form, presentation, and resources available?
- What resource requirements have you identified, within known budget parameters?
- How have you established the time frame for production of the information in accordance with management information needs?
- What requirements are there in relation to information access, security, integrity and confidentiality?
- What requirements are there in relation to information authorisation, circulation and record retention requirements?

2. Identify and research information sources. Information sources may include but are not limited to - paper based, electronic and human sources.

- What internal information sources have you identified and researched to obtain the relevant information and data?
- What external information sources have you identified and researched? (External information sources may include but are not limited to – external suppliers, industry sources, information networks).
- What, if any, coordination within and across the organisation was required to meet the information needs?

3. Select, collate, and process information.

- How have you selected information from the sources and checked it for accuracy, relevance, and reliability in relation to the information needs?
- Explain how the selection, collation, and processing of the business information has retained linkages to prior periods and predictions for future periods, if this contributes to the interpretation and understanding of the information you have produced.

4. Produce business information for management.

- Did you produce the information within the allocated resources?
- What, if any, copyright and privacy requirements did you have to consider?
- How did you get the information authorised and circulated?
- How did you retain the records of information to be in accordance with organisation policies and administration procedures?

Assessment Task Two – Element 4

This assessment task is designed to assess your ability to:

- Produce business information for management.

Task two instructions

This task follows on from Task One. You are required to provide the assessor with copies of the two pieces of business information which you prepared for management.

Your assessor will assess the business information against the following performance criteria:

- Relevant material, facts, data and information are accurate, and are produced in a concise and organised manner that addresses the needs and priorities of recipients and facilitates understanding.
- Implications of information and data are explained in a manner consistent with the needs of the recipients, and assumptions or limitations relating to the information are made explicit.
- Information produced includes critical analysis and interpretations, with any conclusions and recommendations justified.
- Information is produced within allocated resources.
- Information is produced in formats consistent with identified purpose, scope, and structure, and in accordance with copyright and privacy requirements.

Assessment Task Three – Element 4

This assessment task involves you gaining a verification form from the person who requested each of the two pieces of business information, to confirm that you produce business information for management that meets all the requirements of the unit standard.

Task three instructions

At the end of task three, you will have either one verification form (if both requests came from the same person), or two verification forms (if the requests came from different people). Note that if the requests came from two different people that you will need to make an additional copy of the verification form.

Ask the person who requested the information to complete the following verification form. You should supply them with an outline of the business information request (to ensure they can remember what the details of the request were), along with a copy of the prepared business information, if they do not already have this.

You should then collect the completed verification form back before your assessor requires it to be submitted. You may find it useful to give the person a date that you need this completed by.

Manager's Verification Form

Learner's name: _____

Evaluation completed by: _____

Your position in the organisation: _____

The above learner is working towards unit standard 11646 (Prepare business information for management). Your verification is required to confirm the learner's ability to produce business information for management that meets the performance criteria of the unit standard.

At your request, the learner has prepared a piece of business information for management, which you should read and use as an actual example of the learner's work. The learner will also supply you with an outline of the information you requested.

Please read the performance criteria listed below, which the learner must meet to be deemed competent in this unit standard. Then complete the verification statement at the bottom of the page.

Please note: although you should use the piece of business information supplied when verifying the learner's ability, they must also *consistently* produce business information to the standard required for every one of the performance criteria listed.

Produce business information for management

Information may include but is not limited to: business reports, statistical information, financial information, graphical information, computer generated spreadsheets, database reports, word-processed information.

- 1 Relevant material, facts, data and information are accurate, and are produced in a concise and organised manner that addresses the needs and priorities of recipients and facilitates understanding.
- 2 Implications of information and data are explained in a manner consistent with the needs of the recipients, and assumptions or limitations relating to the information are made explicit.
- 3 Information produced includes critical analysis and interpretations, with any conclusions and recommendations justified.
- 4 Information is produced within allocated resources.
- 5 Information is produced in formats consistent with identified purpose, scope, and structure, and in accordance with copyright and privacy requirements.
- 6 Information is prioritised in accordance with identified needs and priorities.
- 7 Information is authorised and circulated, and records of information are retained in accordance with organisation policies and administration procedures.

I verify that the above named learner consistently produces business information for management to a level which meets all of the above performance criteria.

Signed: _____

Date: _____

Assessment results

These are the judgements that your assessor will use to assess you.

Do the learner's answers in task one adequately show their ability to establish management information needs?	Yes	No
Do the learner's answers in task one adequately show their ability to identify and research information sources?	Yes	No
Do the learner's answers in task one adequately show their ability to select, collate, and process information?	Yes	No
Do the learner's answers in task one adequately show their ability to produce business information for management?	Yes	No
Do the two copies of business information produced for management meet the performance criteria outlined in element 4 of the unit standard?	Yes	No
Does the verification form(s) in task three confirm that the learner consistently meets all of the performance criteria outlined in element 4 of the unit standard?	Yes	No