2016 Suite

Oxford Cambridge and RSA

Cambridge **TECHNICALS LEVEL 2**

# *BUSINESS ADMINISTRATION*

Cambridge TECHNICALS 2016

## Unit 5

## Follow administrative practices and create procedures

**F/615/5466**

Guided learning hours: 60

Version 1 September 2018

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# LEVEL 2

# UNIT 5: Follow administrative practices and create procedures

# F/615/5466

**Guided learning hours:** 60

**Essential resources required for this unit:** None

**Assessment: This unit is internally assessed by the centre and externally moderated by OCR.**

## UNIT AIM

This unit aims to develop essential skills and understanding relating to well-defined and routine administrative duties completed by those in an administrative role in business.

You will learn how to effectively create, locate, store, search and retrieve data for a given purpose in a timely manner. In addition, using a variety of different administrative technologies, you will have the opportunity to create, develop and distribute a range of business documents using appropriate distribution channels, ensuring that they are fit for the required purpose.

You will also develop the essential skills to be able to effectively support the organisation of both face-to-face and virtual business meetings. You will prepare for, and set up, business meetings and complete follow-up tasks. In addition, you will have the opportunity to create administrative procedures for yourself, and others within the organisation, to follow.

# TEACHING CONTENT

The unit content describes what has to be taught to ensure that learners are able to access the highest grade.

Anything which follows an i.e. details what must be taught as part of that area of content.

Anything which follows an e.g. is illustrative, it should be noted that where e.g. is used, learners must know and be able to apply relevant examples to their work though these do not need to be the same ones specified in the unit content.

| Learning outcomes<br><br>The Learner will: | Teaching content<br><br>Learners must be taught: |
|---|---|
| 1. Be able to produce and distribute business documents | 1.1 How to produce routine business documents using business conventions i.e.<br>• documents for production (i.e. letters, agendas, emails, notices, minutes, presentations)<br>• methods of producing the documents (e.g. minute taking styles - action only, discussion points and actions)<br>• select and use appropriate software to produce documents (i.e. word processing, spreadsheets, databases, desktop publishing, email, presentations)<br>• produce and integrate relevant items into business documents (i.e. business images, logos, pictures, graphs from simple pivot tables)<br>• proofread documents (e.g. typographical errors, grammatical errors, language, tone)<br>• presentation style (e.g. templates, house-style, image, logo)<br>• formality requirements (e.g. email may be less formal than a letter)<br>• data protection<br>• copyright<br>• conventions for formal letters, e.g.<br>o layout of information<br>o greeting and ending<br>o signing on behalf of a colleague<br><br>1.2 When to distribute documents using a certain channel i.e.<br>• physical distribution (e.g. by post or by hand) versus electronic distribution (e.g. email, file sharing, intranet)<br>o security requirements (e.g. signature required, password protected, read-only, email BCC function)<br>o logging requirements (e.g. read receipt, signature sheet)<br>• using the best practice business convention (e.g. a less formal email response versus emailing a more formal letter) |

| Learning outcomes<br>The Learner will: | Teaching content<br>Learners must be taught: |
|---|---|
| 2. Be able to locate, store, search and retrieve data for routine administrative tasks | 2.1 How to i.e.<br>• locate<br>• store<br>• search<br>• retrieve<br>data from electronic and paper-based folders<br><br>2.2 Good practice for storing and retrieving data i.e.<br>• requirements regarding security (e.g. usernames and passwords)<br>• filing structures/systems (e.g. paper files, electronic files)<br>• accessibility for relevant parties (e.g. shared drives)<br>• naming conventions (e.g. date included, recognisable name for retrieval, version name)<br>• file type (e.g. read only, PDF)<br>• archiving requirements<br>• data protection<br><br>2.3 How to report issues i.e.<br>• types of technological problems to be reported (e.g. no access to a specific drive for retrieving a required document, password protect file issues, software installation and updates)<br>• which members of staff should be notified and the process<br>• timescales involved in resolving issues<br>• identifying and reporting outcomes (e.g. to other team members) |
| 3. Be able to support business meetings | 3.1 How to plan for business meetings i.e.<br>• type of meeting i.e.<br>o formal<br>o informal<br>o virtual<br>o internal attendees<br>o external attendees<br>• obtain details of required attendees<br>• identify meeting roles (e.g. chair, minute taker)<br>• establish type of venue required i.e.<br>o internal meeting room<br>o external venue<br>o virtual meeting<br>• establish facilities and equipment required (e.g. laptop, screen, hands-free phone, consider the potential needs of attendees (e.g. access arrangements, dietary requirements))<br>• travel constraints of attendees (e.g. geographical location and the impact on travel, start/finish times) |

| Learning outcomes<br>The Learner will: | Teaching content<br>Learners must be taught: |
|---|---|
| | 3.2 How to produce documentation required for business meetings i.e.<br>• invitations<br>• agenda<br>• sign-in sheet<br>• delegate packs (e.g. including agenda, copy of presentation printouts)<br><br>3.3 How to set up business meetings i.e.<br>• send invites and log returns (e.g. meeting wizard)<br>• confirm meeting arrangement details (e.g. confirmation of venue/times, log-in details for virtual meetings)<br>• book venue according to requirements (e.g. room size, location, IT facilities, attendee needs)<br>• book or ensure availability of resources (e.g. laptop, screen, hands-free phone)<br>• specify meeting room set-up (e.g. tables, chairs, required meeting documentation)<br><br>3.4 How to complete follow-up tasks for business meetings i.e.<br>• distribute required documentation (e.g. copy of completed minutes, copies of presentation slides)<br>• track action points to ensure they are followed up |

## GRADING CRITERIA

| LO | Pass | Merit | Distinction |
|---|---|---|---|
| The learner will: | The assessment criteria are the Pass requirements for this unit. | To achieve a Merit the evidence must show that, in addition to the Pass criteria, the candidate is able to: | To achieve a Distinction the evidence must show that, in addition to the Pass and Merit criteria, the candidate is able to: |
| 1. Be able to produce and distribute business documents | P1: Produce accurate business documents using a range of appropriate software to include:<br>• a letter<br>• an agenda<br>• an email<br>• a notice<br>• a presentation | M1: Take and produce accurate minutes at a meeting | |
| | P2: Integrate relevant business images/pictures, logos and simple graphs into business documents | | |
| | P3: Distribute business documents to relevant personnel using appropriate distribution channels | M2: Employ a system for requesting safe receipt of business documents by the intended recipient | D1: Create a system for:<br>• logging the documents that have been distributed<br>• logging documents that have been received<br>• ensuring safe redistribution of documents to potential non-recipients |

| LO | | Pass | Merit | Distinction |
|---|---|---|---|---|
| 2. | Be able to locate, store, search and retrieve data for routine administrative tasks | P4: Locate, store, search and retrieve data from paper-based and electronic folders | M3: Comply with good practice procedures when storing and retrieving data | |
| | | P5: Report a technological issue | | |
| 3. | Be able to support business meetings | P6: Plan for a business meeting | | |
| | | P7: Produce business meeting documentation for a specific purpose | | D2: Create folders to store documentation for a meeting group and a corresponding filing guide on how to use them |
| | | P8: Set up a<br>• face-to-face meeting<br>• virtual meeting<br>in line with requirements | M4: Check meeting rooms and facilities in advance of business meetings and identify any missing or faulty equipment or documentation | D3: Arrange for missing or faulty equipment or documentation to be replaced and available in time for the start of the meeting |
| | | P9: Produce and dispatch meeting documentation, in line with requirements | | D4: Create a system for tracking that action points from a meeting are being completed by others and reporting progress to relevant personnel |
| | | P10: Complete follow-up procedures for a business meeting | | |

## ASSESSMENT GUIDANCE

It is important for learners to have the opportunity to learn and apply their knowledge and skills to meaningful substantial tasks, in order to successfully achieve the unit.

Feedback to learners: you can discuss work-in-progress towards summative assessment with learners to make sure it's being done in a planned and timely manner. It also provides an opportunity for you to check the authenticity of the work. You must intervene if you feel there's a health and safety risk.

Learners should use their own words when producing evidence of their knowledge and understanding. When learners use their own words it reduces the possibility of learners' work being identified as plagiarised. If a learner does use someone else's words and ideas in their work, they must acknowledge it, and this is done through referencing. Just quoting and referencing someone else's work will not show that the learner knows or understands it. It has to be clear in the work how the learner is using the material they have referenced **to inform their** thoughts, ideas or conclusions.

For more information about internal assessment, including feedback, authentication and plagiarism, see the centre handbook. Information about how to reference is in the OCR *Guide to Referencing* available on our website: http://www.ocr.org.uk/i-want-to/skills-guides/.

Evidence should come from the learner demonstrating their ability to fulfil an administrative role in business. A variety of different business situations could be used in order to produce and distribute different business documentation, store and retrieve information for business purposes and support business meetings.

The Teaching Content for 1.1 intends to consolidate teaching from other areas of the curriculum, such as writing for a purpose. Learners should be able to use best practice business conventions for producing the relevant documentation (e.g. business conventions for producing a formal letter).

In order to meet Grading Criteria **P1** learners must evidence that they can produce **each of** the documents listed with accuracy (e.g. that they have been proof-read for errors). They must use **appropriate** software for each specific document and incorporate the correct presentation format (e.g. house-style, templates, formality). All documents must be business-related, for example, the notice may be updating external customers about a change to an existing business product or be advising of temporary changes to office hours.

To meet **M1**, learners must evidence that they can take and produce accurate minutes for a meeting (e.g. a team meeting). The minutes must meet the format agreed for the meeting (e.g. actions only, discussion points and actions, include quotes) and should include as a minimum:

- the date, time and title of the meeting
- details of those present and those who have sent apologies
- action points and the name or initials of the person an action is allocated to
- the timescale for completing the action.

**P2** requires learners to integrate relevant items into documents as appropriate. **As a minimum** they should insert:

- a business image/picture
- a logo
- a simple graph from a pivot table.

**P3** requires learners to distribute documents via appropriate 'distribution channels' – these may be physical (i.e. by hand or post) or electronic (e.g. by email or file sharing). The documents should be distributed to all relevant personnel, for example, all delegates invited to a meeting (whether they attended or sent apologies) should be sent copies of the meeting minutes.

To meet Grading Criteria **M2**, learners should use a system that allows them to see that a document dispatched has been received (e.g. read-receipt on email, confirmation from the recipient). For **D1** they should create a system for logging the documents that have been distributed, logging the receipt confirmations and be able to identify and chase-up non respondents ensuring that the documents are redistributed to, and safely received by, those that may not have received them on first send.

To meet **P4**, learners should evidence that they can locate, store, search and retrieve documents from folders. Ideally they will evidence that this can be completed using both paper-based filing structures and electronic structures. However, in the case of a 'paperless office', it is acceptable to meet this criterion using electronic structures only.

To meet **M3**, learners should evidence that they can adhere to the good practice methods identified in the teaching content for 2.2, when storing and retrieving data (e.g. that suitable filenames are used; that documents are stored in a suitable format (e.g. as a read-only document); that documents are in a place accessible for all relevant users to retrieve; that relevant data is archived at appropriate times).

To meet **P5**, learners should provide suitable evidence that they have reported a technological issue that has occurred as a result of completing specific tasks. The technological issue should have prevented the learner from completing the task, enabling them to report the issue. It is important that the learner demonstrates their ability to report this issue using the correct organisational processes.

To meet **P6-P8**, learners will evidence that they can plan for and set up, a face-to-face **and** a virtual meeting that they will book on behalf of a colleague/s, including producing all relevant documentation. They will also book appropriate venues in line with the requirements obtained from their colleague/s. When booking the venue/s they should evidence all relevant elements of teaching content 3.3 (e.g. that the venue is of an appropriate size and location, that any additional equipment is booked/requested (e.g. laptop, screen), that the required room layout is specified, that attendee requirements can be met (e.g. dietary or access requirements)). If the learner completes this at a venue that does not have a specific team to set up the tables/chairs in a meeting room, they will need to cover this aspect themselves.

To meet **D2**, learners should set up appropriately named folders for a specific meeting group (i.e. where a series of meetings for that group will occur over a period of time). All documentation relating to the meetings should be stored within the folders using naming conventions that make them clearly identifiable and accessible to all who may need to access them (e.g. avoiding generic folder names such as 'Emails/meeting emails', and using something more identifiable such as 'Invites & responses'). Learners should also create a corresponding filing guide to ensure that others can adhere to their filing system.

Teachers should ensure that learners within the same cohort create individual filing systems that relate to different meeting groups. We do not expect to see identical filing structures and guidance from all learners.

In order to meet Grading Criteria **M4**, learners will use their initiative to check a meeting room in advance of the meetings that they have supported the organisation of, to ensure that all requirements have been met (i.e. the face-to-face meeting and the virtual meeting). They will be able to identify any issues with requirements and report these to their colleague/s for advice. To meet **D3**, they will identify that there is an issue with the meeting set-up and independently address this in advance of the meeting starting, to ensure smooth running of the meeting on behalf of their colleague/s. Centres may need to simulate this aspect to ensure that a defect can be identified and addressed by the learner. The defect should not be the same for all learners within the same cohort.

**P9** requires learners to produce and dispatch all relevant meeting documentation in line with teaching content identified in 3.3 and 3.4.

**P10** requires learners to complete any standard follow-up procedures, following the meeting (e.g. dispatching minutes to relevant parties, dispatching copies of the presentation slides used). To meet **D4**, learners must create a straightforward procedure for tracking that actions from a meeting are being completed by others as required. The procedure should include chasing outstanding actions and reporting progress on them to relevant personnel (e.g. the Chair of the meeting) in advance of the next scheduled meeting.

## SYNOPTIC ASSESSMENT

Synoptic assessment is a feature of this qualification and it requires learners to use an appropriate selection of their skills, knowledge and understanding, acquired through all of the units that make up their qualification, in an integrated way and apply them to a key task or tasks.

This helps learners to develop their appreciation and understanding of the connections between the different elements of learning in this qualification to help make their curriculum meaningful and better prepare them for employment in the Business Administration sector, please see section 6 of the centre handbook for more detail.

Links between this unit and other units:

| Specific LO from this unit | Name of other unit and related LO |
|---|---|
| LO1 Be able to produce and distribute business documents | Unit 1 Principles of working in service sector organisations LO6<br><br>Unit 2 Understand customer expectations and issues LO6 |
| LO3 Be able to support business meetings | Unit 1 Principles of working in service sector organisations LO4<br><br>Unit 6 Communicate in a business environment LO1, LO2 and LO3<br><br>Unit 7 Support the organisation of an event LO2, LO3 |

## MEANINGFUL EMPLOYER INVOLVEMENT - A REQUIREMENT FOR TECHNICAL CERTIFICATE QUALIFICATIONS

The minimum amount of employer involvement must relate to at least one or more of the elements of the mandatory content. This unit is mandatory in the Level 2 Cambridge Technical Diploma in Business Administration.

This qualification has been designed to be recognised as a Technical Certificate in performance tables in England. It is a requirement of this qualification for centres to secure employer involvement through delivery and/or assessment of this qualification for every learner.

Eligible activities and suggestions/ideas that may help you in securing meaningful employer involvement for this unit are given in the table below.

Please refer to the Qualification Handbook for further information including a list of activities that are not considered to meet this requirement.

| Meaningful employer involvement |
|---|
| It is recommended that learners undertake structured work-experience or work-placements that develop skills and knowledge relevant to this unit.<br><br>They may also benefit from industry professionals visiting the centre to act as guest speakers. |

You can find further information on employer involvement in the delivery of qualifications in the following documents:

- Employer involvement in the delivery and assessment of vocational qualifications
- DfE work experience guidance.

**ocr.org.uk/business**

OCR customer contact centre

**Vocational qualifications**

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