

Model Assignment

Issued September 2009

OCR Administration (Business Professional)

UNIT 2 (LEVEL 1): CREATING BUSINESS DOCUMENTS

Please note:

This OCR model assignment may be used to provide evidence for the unit above. Alternatively, centres may wish to adapt this assignment or devise their own assignment for the purposes of assessment. It is the centre's responsibility to ensure that any adaptations made to this assignment allow learners to meet all the assessment criteria and provide them with sufficient opportunity to demonstrate achievement across the unit.

This unit has a credit value of 3 on the Qualifications and Credit Framework (QCF). The scheme codes for the OCR Administration (Business Professional) qualifications towards which successful completion of this unit assessment may contribute are:

OCR Scheme code	Qualification Title	Qualification Accreditation Number (QAN)
03952	OCR Level 1 Award in Administration (Business Professional)	500/6124/0
03953	OCR Level 1 Certificate in Administration (Business Professional)	500/6122/7
03954	OCR Level 1 Diploma in Administration (Business Professional)	500/6123/9

The QCA Accreditation Number for this unit is: K/502/4005

This OCR model assignment remains live for the life of these qualifications.

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Model Assignment: Tutor Information

OCR Administration (Business Professional)

UNIT 2 (LEVEL 1): CREATING BUSINESS DOCUMENTS

Introduction to the Tasks

The tasks have been designed to enable learners to demonstrate their skills, knowledge and understanding of professional administration in the business world. Learners will describe different types of business documents and state the circumstances which are most appropriate for the use of each of these. They will state why templates are used for some business documents and why some businesses adopt a house style for certain documents. Learners will also state whether formal or informal communication styles should be used. They will then produce routine business documents using the appropriate communication style and check their documents for accuracy.

The tasks have been designed so that all of the assessment criteria in this Unit are addressed.

For Task 4, learners will need to use letterheaded paper, for Task 5, an email form, for Task 6, a memo form and for Task 7, learners will need to use a telephone message form. Examples of these can be found on pages 8 to 11. If learners choose to use a word processor, tutors will need to produce templates for these documents and to ensure that learners are given the filenames required.

Learners must ensure that they use accepted layouts and conventions in all their documents and must ensure that their documents are accurate. They should be advised to proofread their work carefully and should not rely solely on spellcheckers and grammar checkers. Accuracy must be checked by assessors. Only documents that are fit for purpose should be included in the evidence sent to the moderator.

These guidance notes must be used in conjunction with the unit specification and Centre Handbook.

The Tasks

Task 1: Different types of business documents and when they might be used

Assessment Criterion 1.1 is assessed in this task.

In this task, learners need to identify five different business documents.

Learners then need to state the purpose of each of these documents and when they are most likely to be used.

Evidence for this task could be in the form of a table or notes.

Task 2: Using templates for business documents

Assessment Criterion 1.2 is assessed in this task.

In this task, learners need to state why templates are used for some business documents.

To evidence this task, learners could produce notes.

Task 3: Using formal and informal communication styles

Assessment Criterion 2.1 is assessed in this task.

In this task, learners need to state the style of communication (formal or informal) that should be used for different business documents.

To evidence this task, learners should complete the table that is provided (Appendix 1 – see page 18). They should state the style of communication that should be used for each example given and should give reasons for their choice.

Task 4: Adopting a “house style” for certain documents

Assessment Criterion 2.2 is assessed in this task.

In this task, learners need to state why the company in the scenario has adopted a house style for certain documents.

To evidence this task, learners could produce notes.

Tasks 5 - 8: Produce documents

Assessment Criteria 3.1 and 3.2 are assessed in these tasks

Please note that, regardless of any modifications that may be made to the model assignment for this unit, at least **four** different types of business document must be produced by learners, of which **one** must be a letter.

Task 5: Produce a letter using the appropriate communication style and check for accuracy

Assessment Criteria 3.1 and 3.2 are assessed in this task.

In this task, learners need to produce a letter on letterheaded paper. A letterheading can be found on page 8 and this may be photocopied for use by learners. For those who opt to use a word processor to produce the letter, tutors should produce a template of the letterheading.

To evidence this task, learners need to produce the letter requested, using the information provided, and ensure their letter is accurate. They should ensure that they use the appropriate communication style and accepted layout and conventions.

Task 6: Produce an email using the appropriate communication style and check for accuracy

Assessment Criteria 3.1 and 3.2 are assessed in this task.

In this task, learners need to produce an email on an email form. An email form can be found on page 9 and this may be photocopied for use by learners. For those who opt to use a word processor to produce the email, tutors should produce a template of the email form.

To evidence this task, learners need to produce the email requested, using the information provided, and ensure their email is accurate. They should ensure that they use the appropriate communication style.

Task 7: Produce a memo using the appropriate communication style and check for accuracy

Assessment Criteria 3.1 and 3.2 are assessed in this task.

In this task, learners need to produce a memo on a memo form. A memo form can be found on page 10 and this may be photocopied for use by learners. For those who opt to use a word processor to produce the memo, tutors should produce a template of the memo form.

To evidence this task, learners need to produce the memo requested, using the information provided. They should ensure that they use the appropriate communication style and accepted layout and conventions. Learners must ensure that their memo is accurate.

Task 8: Produce a telephone message and check for accuracy

Assessment Criteria 3.1 and 3.2 are assessed in this task.

In this task, learners need to produce a telephone message by completing a telephone message form. A message form can be found on page 11 and this may be photocopied for use by learners. For those who opt to use a word processor to produce the telephone message, tutors should produce a template of the message form.

Tutors need to set up a recording of a telephone call from which learners will take down the message. This may be provided on disc or tape or the tutor may read it to the learners.

An example of a telephone message follows:

"Hello, this is John Summers here, Manager of the Grand Hotel in Bournemouth. I wish to speak to Suzie Martin as soon as possible regarding a problem with the tour which is due to arrive here tomorrow. Please ask her to phone me urgently. My telephone number is 01202 016036. Thank you."

To evidence this task, learners need to produce the telephone message from a recording or from live dictation. They must ensure that their message is accurate.

Scope of permitted Model Assignment modification

The model assignment is self-contained in its present form. The set of tasks form a coherent whole addressing all the Assessment Criteria [AC].

No changes to the Assessment Criteria are permitted. However, the model assignment can be changed in terms of the introductory scenario, which can be contextualised or amended. However, the scenario must still be set within a business context and must have a clear business purpose/objective.

The following would remain broadly the same, providing a common structure for the range of model assignments produced:

- individual learners' evidence for practical activities
- controls for task taking
- links to other unit assignments, learning and work experience

If modifications are made to the model assignment it is up to the centre to ensure that all assessment criteria are adequately covered.

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Checklist of types of evidence

When completing this model assignment it may be possible to generate evidence for completing a task in a variety of formats. This list is not exhaustive and will depend on the approach taken to complete the task or model assignment. In some cases the task will require a specific format for the outcome and this will be clearly marked in the table with these items in bold.

Task activity	Examples of evidence – specifically required items in bold	Assessment Criteria coverage
Task 1 Different types of business documents and when they might be used	<ul style="list-style-type: none"> • Table or notes 	Assessment Criterion <ul style="list-style-type: none"> • 1.1
Task 2 State why templates are used for some business documents	<ul style="list-style-type: none"> • Notes 	Assessment Criterion <ul style="list-style-type: none"> • 1.2
Task 3 Using formal and informal styles of communication	<ul style="list-style-type: none"> • Completed table 	Assessment Criterion <ul style="list-style-type: none"> • 2.1
Task 4 State why Monarch Coach Tours Ltd has adopted a house style for certain documents	<ul style="list-style-type: none"> • Notes 	Assessment Criterion <ul style="list-style-type: none"> • 2.2
Tasks 5 - 8 Produce documents	For the model assignment: <ul style="list-style-type: none"> • Accurate letter • Accurate email • Accurate memo and • Accurate telephone message Required even if model assignment is adapted: <ul style="list-style-type: none"> • At least <u>four</u> different, accurate business documents, including <u>one</u> letter 	Assessment Criteria <ul style="list-style-type: none"> • 3.1 • 3.2

Model Assignment

STATIONERY FOR LEARNER USE

OCR Administration (Business Professional)

UNIT 2 (LEVEL 1): CREATING BUSINESS DOCUMENTS

Each learner will require:

- letterheaded paper
- email form
- memo form
- telephone message form

Tutors may photocopy these examples for learners to use in this Assignment.

If learners choose to use a word processor, tutors will need to produce electronic templates for these documents. The filenames under which these have been saved must be made available to learners.

MONARCH COACH TOURS LTD

MONARCH HOUSE
52 TORQUAY ROAD EXETER EX1 5JB
TEL 01392 929292
FAX 01392 959493

From:	admin@monarchtours.biz
To:	
Sent:	
Subject:	

MEMO

TO

FROM

DATE

SUBJECT

Model Assignment: Learner Information

OCR Administration (Business Professional)

UNIT 2 (LEVEL 1): CREATING BUSINESS DOCUMENTS

Q *Do I have to pass this assignment?*

A Yes. You must pass this assignment to achieve the unit.

Q *What help will I get?*

A Your tutor will help you when completing the OCR model assignment and will make sure that you know what resources/facilities you need and are allowed to use.

Q *What if I don't understand something?*

A It is your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *Can I use other people's work?*

A No. The work that you produce must be your own and you may be asked to sign a declaration confirming this. You should never copy the work of other learners or allow other learners to copy your work. Any information that you use from other sources, e.g. books, newspapers, professional journals or the Internet must be clearly identified and not presented as your own work.

Q *Can I work in a group?*

A Yes. However, if you work in a group at any stage you must still produce work that shows your individual contribution.

Q *How should I present my work?*

A You can present your work in a variety of ways, e.g. hand-written, word-processed, on video. However, what you choose should be appropriate to the task(s) and agreed with your tutor. For some work, e.g. presentations, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet will usually be used for this. If you are unsure, check with your tutor.

Q *When I have finished, what do I need to hand in?*

A You need to hand in the work that you have completed for each task. Do not include any draft work or handouts unless these are asked for. When you hand in your work make sure that it has your name and the unit title clearly marked and that it is in the correct order for assessment.

Q *How will my work be assessed?*

A Your work will be marked by an assessor in your centre. The assessor will mark the work using the assessment objectives in the qualification specification. The work will then be sent to an OCR Moderator to ensure that assessors from all centres are marking correctly. You have not passed this unit until this is confirmed by OCR.

Q *Will my work be returned?*

A Submitted work will not be returned so please ensure you keep copies of everything you produce.

Scenario

Monarch Coach Tours Ltd

You are employed at Monarch House, the main office of Monarch Coach Tours Ltd. The company provides coach tours and holidays throughout the United Kingdom and Europe.

You work as a junior administration assistant to Ms Suzie Martin, the company's Office Manager. You carry out a range of administrative duties including dealing with enquiries from prospective customers. You also take telephone messages for Suzie when she is away from her desk.

Enquiries are made by email, letter and telephone.

Tasks

Introduction

In order to achieve this unit, you are required to assist Suzie Martin by undertaking a number of tasks including the production of four business documents; a letter, an email, a memo and a telephone message.

Task 1: Different types of business documents and when they might be used

Assessment Criterion 1.1

Suzie Martin wants to make sure that you are aware of the range of documents used in business and when each is most likely to be used.

Your task is to:

- identify five different business documents
- state the purpose of each of these documents and when they are most likely to be used.

Your evidence for this task could be a table or clear notes.

Task 2: Using templates for business documents

Assessment Criterion 1.2

Suzie tells you that Monarch staff use templates for many business documents.

Your task is to:

- state why templates are used for some business documents.

Your evidence for this task will be notes that Suzie can use when producing her training materials for new administration assistants.

Task 3: Using formal and informal communication styles

Assessment Criterion 2.1

Suzie tells you that Monarch staff receive and send out many different documents, external and internal, during their working day. Some of these use a formal style of communication, while others use an informal communication style.

Your task is to:

- complete the table, which is included as Appendix 1 (page 18) – you need to:
 - ✓ state the style of communication (formal or informal) that should be used for each example given

- ✓ give reasons for your choice of communication style.

Your evidence for this task will be the completed table.

Task 4: Adopting a “house style” for certain documents

Assessment Criterion 2.2

Suzie tells you that Monarch Coach Tours Ltd uses a house style for documents but she feels that some new members of staff do not understand why a house style is used.

Your task is to:

- state why Monarch Coach Tours Ltd has adopted a house style for certain documents.

Your evidence for this task will be notes that Suzie can use when producing her training materials for new administration assistants.

Task 5: Produce a letter

Assessment Criteria 3.1 and 3.2

Suzie has received a high volume of telephone enquiries recently and has asked you to help her with these.

Suzie tells you that Mr Joseph Randall phoned today. He and his wife are very interested in joining next month’s tour to Scotland. She asks you to write to Mr Randall, whose address is 51 Homeview Crescent, Southampton, SO4 7XZ. You need to enclose the ‘Highlands and Islands’ brochure and to inform Mr Randall that there are spaces at present on the tour.

Your task is to:

- produce the letter to Mr Randall as requested – Suzie Martin will sign the letter
- use the appropriate communication style
- use accepted layout and conventions
- check that your letter is accurate.

Your evidence will be the letter you produce. You should use the letterheaded paper provided or, if you choose to use a word processor, the letterhead template provided.

Task 6: Produce an email

Assessment Criteria 3.1 and 3.2

Suzie tells you that Gideon Jenkins spoke to her yesterday about the possibility of using his staff discount voucher on the tour to Normandy. Gideon works at Monarch House. Suzie has told Gideon that she is very busy but will ask you to email him with the decision.

Suzie asks you to email Gideon to tell him that he may use the staff discount voucher on this tour, but that he will be expected to help the drivers or couriers from time to time, if required.

Your task is to:

- produce the email to Gideon Jenkins as requested – Gideon’s email address is gideon.jenkins@monarchtours.biz.uk
- use the appropriate communication style
- check that your email is accurate.

Your evidence will be a copy of the email you produce. You should use the email form provided or, if you choose to use a word processor, use an email template.

Task 7: Produce a memo**Assessment Criteria 3.1 and 3.2**

Suzie tells you that it has been decided to offer a discount to customers on next week’s tour to Brighton. There are still 20 seats available.

Suzie needs to inform all sales staff that there will be a 15% discount on all customer bookings for this tour.

Your task is to:

- produce the memo to all staff from Suzie Martin as requested
- use the appropriate communication style
- use accepted layout and conventions
- check that your memo is accurate.

To evidence this task, you need to produce the memo requested. You should use the memo form provided or, if you choose to use a word processor, use a memo template.

Task 8: Produce a telephone message**Assessment Criteria 3.1 and 3.2**

A telephone call has been received from Mr John Summers, the Manager of the Grand Hotel in Bournemouth. He wished to speak to Suzie on an urgent matter, but she was away from her desk and Mr Summers had to leave a voicemail message.

Your task is to:

- produce the telephone message from the recording of the telephone call from Mr Summers
- complete a telephone message form
- check that your message is accurate.

Your evidence for this task will be the telephone message. You should use the telephone message form provided or, if you choose to use a word processor, use a telephone message template.

APPENDIX 1

TASK 3

LEARNER NAME:

CENTRE NUMBER:

Please complete this table by stating which style of communication (formal or informal) would be appropriate for each document. Then give reasons for your choice.

DOCUMENT	APPROPRIATE COMMUNICATION STYLE AND REASONS FOR CHOICE
A reply to a letter of complaint which has been received from a customer	
A reply to an email from a colleague in the finance department querying the number of customers booked on next month's tour to Switzerland	
A letter to a customer attaching the company's 'Skiing Tours' brochure	
A reply to a memo from Suzie Martin requesting confirmation of attendance at the staff summer ball	
A letter inviting job applicants to an interview for the post of Finance Manager	
A reply to an email from a customer asking for the price of the 'West Coast' tour for two people sharing a twin-bedded room	
A reply to an email from a colleague inviting you to a team lunch	

Learner Evidence Checklist

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LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Table or notes	
<input type="checkbox"/> Other (please give details)	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Notes	
<input type="checkbox"/> Other (please give details)	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed table	

Task 4 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Notes	
<input type="checkbox"/> Other (please give details)	

Tasks 5 - 8 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Accurate letter <input type="checkbox"/> Accurate email <input type="checkbox"/> Accurate memo <input type="checkbox"/> Accurate telephone message <input type="checkbox"/> Other (please give details)	

I confirm that the items listed above are attached. These have been assessed and provide sufficient evidence to demonstrate that the learner has achieved all of the assessment criteria for this unit.

Signed: _____
Name and position _____
Date: _____