

Unit Title:	Plan and organise meetings
OCR unit number	322
Sector unit number	D/601/2542
Level:	3
Credit value:	5
Guided learning hours:	25

Unit purpose and aim

This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

Learning Outcomes	Assessment Criteria	Exemplification
<p>The Learner will:</p> <p>1. Understand the arrangements and actions required for planning and organising meetings</p>	<p>The Learner can:</p> <p>1.1 Explain the role of the person planning and organising a meeting</p> <p>1.2 Describe the different types of meetings and their main features</p> <p>1.3 Explain how to plan meetings that meet agreed aims and objectives</p> <p>1.4 Explain the purpose of agreeing a brief for the meeting</p> <p>1.5 Explain how to identify suitable venues for different types of meetings</p> <p>1.6 Describe the types of resources needed for different types of meetings</p> <p>1.7 Outline the main points that should be covered by an agenda and meeting papers</p> <p>1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings</p>	<p>This learning outcome must be assessed using methods appropriate to the assessment of knowledge and understanding. A holistic approach to assessment should be adopted so that one piece of evidence covers more than one learning outcome and several assessment criteria.</p>

	<p>1.9 Describe the health, safety and security requirements that need to be considered when organising meetings</p> <p>1.10 Explain the purpose and benefits of briefing the chair before a meeting</p> <p>1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required</p> <p>1.12 Describe the types of information, advice and support that may be need to be provided during a meeting</p> <p>1.13 Describe the types of problems that may occur during a meeting and how to solve them</p> <p>1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved</p> <p>1.15 Explain how to record actions and follow up, if required</p> <p>1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting</p> <p>1.17 Describe how to agree learning points to improve the organisation of future meetings</p>	
<p>2. Be able to prepare for a meeting</p>	<p>2.1 Agree and prepare the meeting brief, checking with others, if required</p> <p>2.2 Agree a budget for the meeting, if required</p> <p>2.3 Prepare and agree an agenda and meeting papers</p> <p>2.4 Organise and confirm venue, equipment and catering requirements, when necessary</p> <p>2.5 Invite attendees, confirm attendance and identify</p>	<p>Assessment should be planned to maximise the opportunities for the candidate to demonstrate their ability to plan and organise meetings.</p>

	<p>any special requirements</p> <p>2.6 Arrange catering, if required</p> <p>2.7 Arrange the equipment and layout of the room, if required</p> <p>2.8 Make sure the chair receives appropriate briefing</p>	
3. Be able to support running a meeting	<p>3.1 Welcome attendees and offer suitable refreshments (if required)</p> <p>3.2 Make sure attendees have full set of papers</p> <p>3.3 Make sure a person has been nominated to take minutes, if required</p> <p>3.4 Provide information, advice and support when required</p>	
4. How to follow up a meeting	<p>4.1 Produce a record of the meeting</p> <p>4.2 Seek approval for the meeting record, amend as required</p> <p>4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record</p> <p>4.4 Follow up action points, if required</p> <p>4.5 Evaluate meeting arrangements, and external services where used</p> <p>4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used</p> <p>4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support</p>	

Assessment

This unit is centre assessed and externally verified. A holistic approach to assessment should be adopted so that one piece of evidence covers more than one learning outcome and several assessment criteria and where appropriate, provides evidence across several units. Your assessor will use a range of assessment methods which may include:

- observation of performance in the work environment
- examination of work products
- questioning the learner
- discussing with the learner
- use of others (witness testimony)
- looking at learner statements
- recognising prior learning

Evidence requirements

A range of evidence should be gathered to cover the Learning Outcomes and Assessment Criteria. Examples may include:

- Meeting brief, venue and budget requirements where required
- Planning records
- Resources list
- Venue searches
- Agenda and meeting papers, minutes of previous meeting
- Correspondence relating to booking and confirmation of venue including equipment and catering requirements as required
- Invitation letters/emails
- Special requirements requests (delegates)
- Confirmation of attendees
- Room preparation notes
- Equipment lists
- Chair's agenda
- Chair's papers
- Delegate lists
- Meeting papers
- Feedback sheets and claim forms as required
- Attendance lists

- Draft minutes
- Records of communication with chair
- Final/amended minutes
- Action plans
- Circulation lists
- Records of sending revised minutes
- Correspondence relating to payments if required
- Evaluation of meeting arrangements and external services if used
- Delegate feedback
- Evaluation reports on delegate feedback
- Communications relating to recommendations from evaluations
- Development plans

Guidance on assessment and evidence requirements

Refer to sections on Assessment and Evidence requirements above.

National Occupational Standards (NOS) mapping/signposting

This unit is based on the NOS BAA412 Plan and organise meetings.

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Link to functional skills standards <http://www.qcda.gov.uk/15565.aspx>

Functional Skills Standards					
English		Mathematics		ICT	
Speaking and Listening	✓	Representing	✓	Use ICT systems	✓
Reading	✓	Analysing		Find and select information	
Writing	✓	Interpreting		Develop, present and communicate information	✓

Resources

Access to a working environment with associated equipment and resources

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk .