

Unit Title:	Principles of providing and maintaining administrative services
OCR unit number	304
Sector unit number	TC3-4
Level:	3
Credit value:	4
Guided learning hours:	32

Unit purpose and aim

This unit is about providing and maintaining specific administrative services, including ordering goods and services, minimising waste and delivering effective customer service.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Understand how to order products and services</p>	<p>The Learner can:</p> <p>1.1 Describe procedures for the ordering and supply of products and services for an organisation</p> <p>1.2 Describe how to write a specification for a product or service</p>	<p>1.1 procedures for the ordering and supply of products and services for an organisation may include:</p> <ul style="list-style-type: none"> • Following company procedures • Collating all requests for products and services • Obtaining quotes from a variety of suppliers • Completing purchase orders or requisitions <p>1.2 How to write a specification for a product or service includes:</p> <ul style="list-style-type: none"> • Confirming what is needed • Confirming what the product or service is needed for • Confirming the features it must have

	<p>1.3 Explain the purpose of selecting products and services that represent best value for money</p> <p>1.4 Explain the benefits of reviewing procedures for ordering products and services</p>	<p>1.3 For example to ensure all purchases remain within the allocated and agreed budget</p> <p>1.4 The benefits of reviewing procedures include things such as to ensure procedures are efficient and effective</p>
<p>2 Understand how to keep waste to a minimum in a business environment</p>	<p>2.1. Explain the main causes of waste that may occur in a business environment</p> <p>2.2 Explain ways of keeping waste to a minimum in a business environment</p>	<p>2.1 The main causes of waste include, for example:</p> <ul style="list-style-type: none"> • Unnecessary printing or copying, errors lead to paper, ink and toner waste • Not recycling re-usable items such as paper clips and folders • Leaving electrical items switched on overnight or lights on when the room is not in use <p>2.2 Ways of keeping waste to a minimum include:</p> <ul style="list-style-type: none"> • Minimising errors • Raising staff awareness of wastage • Re-using items such as folders, paper clips, plastic wallets where possible • Electronic files and communication rather than paper • Reducing wasted energy e.g. turning off power, heat and light when not in use • Accessing recycling services for ink cartridges and paper
<p>3 Understand the purpose of delivering effective customer service</p>	<p>3.1 Explain why customer service should meet or exceed customer expectations</p>	<p>3.1 Why customer service should meet or exceed customer expectations includes:</p> <ul style="list-style-type: none"> • To maintain current business • To increase potential

	<p>3.2 Explain the purpose of building positive working relationships with customers</p> <p>3.3 Explain the purpose of identifying customer needs and expectations</p> <p>3.4 Explain the purpose of agreeing quality standards and timescales with customers</p> <p>3.5 Describe methods of reviewing customer service provision within a business environment</p>	<p>business</p> <ul style="list-style-type: none"> • To ensure repeat business <p>3.2 The purpose of building positive working relationships with customers includes:</p> <ul style="list-style-type: none"> • ensuring that the customer gets what they require • ensuring repeat business • ensuring customers help build the organisation's reputation through word of mouth <p>3.3 The purpose of identifying customer needs and expectations includes things such as ensuring that they are getting the right product or service</p> <p>3.4 For example, the purpose of agreeing quality standards and timescales with customers is to ensure their expectations are met.</p> <p>3.5 Methods of reviewing customer service provision within a business environment include, for example,:</p> <ul style="list-style-type: none"> • Reviewing customer feedback • Carrying out customer surveys
4 Know how to take minutes	<p>4.1 Explain the purpose of minutes as an accurate record of discussions and decisions</p> <p>4.2 Describe legal and organisational requirements that may apply to minute taking</p>	<p>4.1 For example as an accurate record of the meeting it ensures all attendees have the same information on what was discussed and decided.</p> <p>4.2 The legal and organisational requirements that may</p>

	<p>4.3 Describe how to take notes during discussions held at meetings</p> <p>4.4 Explain the purpose of, and how to, listen actively when taking minutes</p> <p>4.5 Describe different types and styles of minutes and their purpose</p>	<p>apply to minute taking may include, for example, complying with the Freedom of information act, keeping accurate company records, etc</p> <p>4.3 how to take notes during discussions held at meetings includes::</p> <ul style="list-style-type: none"> • Detailing time date and location • List of attendees • Apologies for absence • Acceptance of previous minutes • Matters arising • Details of items discussed according to the agenda • Any other business • Date of next meeting <p>4.4 Active listening ensures for example minutes or notes are an accurate reflection of what was discussed and decided at the meeting.</p> <p>How to listen actively may includes things such as</p> <ul style="list-style-type: none"> • clarifying points by asking questions • checking and /or repeating what has been said <p>4.5 Different types and styles of minutes and their purpose may include:</p> <ul style="list-style-type: none"> • An action list if the meeting concerned handing out specific responsibilities • A detailed account of the meeting for those minutes or notes that are intended for a wider audience than those present at the meeting
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5 Understand how to organise meetings	<p>5.1 Describe different types of meetings and their main features</p> <p>5.2 Describe the sources and types of information needed to organise meetings</p> <p>5.3 Describe the types of information needed by individuals before, during and after meetings</p>	<p>5.1 For example meetings may be small or large where a variety of topics and terms are discussed which may include:</p> <ul style="list-style-type: none">• team meetings• training meetings• appraisal meetings• web meetings <p>The features of these meeting may include for example</p> <ul style="list-style-type: none">• Following the agenda• review of the minutes or notes of the previous meeting• minute or note taking• resources required <p>5.2 Sources of information may include</p> <ul style="list-style-type: none">• the individual/s requesting the meeting• other colleagues• organisational procedures for arranging a meeting <p>The type of information needed to arrange a meeting may include</p> <ul style="list-style-type: none">• the reason for the meeting• the time, length, date and location• what resources are required• a list of required attendees and their contact details <p>5.3 For example before a meeting:</p> <ul style="list-style-type: none">• Agendas including the chair person's agenda, minutes and any other relevant documentation• Time, duration date and
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		<p>facilities</p> <ul style="list-style-type: none"> • Emergency procedures • Relevant documentation including a conference or event programme <p>For example after an event:</p> <ul style="list-style-type: none"> • An event summary which may include speaker slides and presentations • Follow up documentation • Delegate feedback
<p>7 Understand how to manage diary systems</p>	<p>7.1 Explain the purpose of managing diary systems to plan and co-ordinate activities and resources</p> <p>7.2 Compare different types of diary systems and the situations for which they are appropriate</p> <p>7.3 Describe the information needed to maintain diary systems</p>	<p>7.1 For example the purpose of managing diary systems to plan and co-ordinate activities and resources may include to ensure that activities and the use of resources do not coincide</p> <p>7.2 different types of diary systems include::</p> <ul style="list-style-type: none"> • Electronic systems may be used when organising a diary for another individual as more than one person can access • Electronic systems may also be useful when organising large numbers of people or events to ensure all are managed effectively • Manual diary systems may be more appropriate for personal use or for smaller businesses. <p>7.3 The information needed to maintain diary systems includes:</p> <ul style="list-style-type: none"> • Hours of work • Planned time off • Other events and activities • Provisional or confirmed events

		<ul style="list-style-type: none">• Times, dates and locations of activities• Travelling time before and after meeting if relevant• Allowance of time in the event an event or activity runs over
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Assessment

Assessment will consist of an on-line multiple-choice test. All tests are available on demand.

The test for this unit will be 45 minutes in length and consist of 30 questions. Results will be graded pass or fail.

The grade achieved will be stated on the certificate.

Guidance on assessment and evidence requirements

This unit is assessed via an on demand on-screen multiple-choice test, set and marked by OCR.

Each test will consist of multiple-choice questions which will test candidates' knowledge and understanding across the Learning Outcomes and associated Assessment Criteria. Candidates will be required to have knowledge and understanding of all Assessment Criteria within the unit, as all Assessment Criteria will be covered within any one test.

A number of multiple-choice question types may be used. These could include: closed questions; statements for completion; multiple response questions; true/false questions or ordering questions (including a maximum of 4 steps).

(Please refer to the *Principles of Business and Administration Centre Handbook* for further guidance regarding each type of question).

Centres should refer to the '*OCR Administrative Guide to Vocational Qualifications (A850)*' for Notes on Preventing Computer-Assisted Malpractice.

National Occupational Standards (NOS) mapping/signposting

NOS can viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Business & Administration NOS	311	Plan, organise and support meetings
Business & Administration NOS	313	Organise and coordinate events
Business & Administration NOS	303	Supervise an office facility
Business & Administration NOS	302	Work within your business environment
Business & Administration NOS	304	Procure products and services
Business & Administration NOS	305	Manage and evaluate customer relations
Business & Administration NOS	204	Manage diary systems

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, listening and communication	✓	Representing		Use ICT systems	✓
Reading	✓	Analysing		Find and select information	✓
Writing	✓	Interpreting		Develop, present and communicate information	

Resources

Equipment: In order to deliver the on-line test for this unit, centres will require the minimum hardware stipulated in the OCR document *Minimum Hardware Requirements*. This document is available for downloading from the E-assessment area of the *Business and Administration* website (www.ocr.org.uk).

OCR does not stipulate the mode of delivery for the teaching of the content of this unit. Centres are free to deliver this unit using any mode of delivery that meets the needs of their candidates. Centres should consider the candidates' complete learning experience when designing learning programmes.

Additional information

The *OCR Business and Administration Centre Handbook* contains important information for anyone delivering, working towards or involved with the OCR Business and Administration qualifications, of which this unit forms a part. This can be downloaded from OCR's website www.ocr.org.uk.

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