

Administration (Business Professional)

Unit Title:	Organise meetings
OCR unit number:	13
Level:	2
Credit value:	3
Guided learning hours:	30
Unit reference number:	M/502/3826

Unit purpose and aim

This unit aims to equip the learner with the knowledge and skills to liaise with a line manager or colleague to make arrangements to hold a meeting and support the effective running of that meeting. In addition, the learner should be able to assist in the reproduction and distribution of minutes and other documents to the correct recipients after the meeting has taken place. Learners are not required to take the minutes themselves.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Be able to make arrangements to support meetings within a business environment</p>	<p>The Learner can:</p> <p>1.1 Identify the purpose of meetings</p> <p>1.2 Confirm the requirements of meetings including:</p> <ul style="list-style-type: none"> • Date • Time • Duration • Location • Attendees • Facilities <p>1.3 Book rooms for specified meetings</p> <p>1.4 Confirm bookings for meeting rooms</p>	<ul style="list-style-type: none"> • Communicate with line manager/colleague to ascertain requirements and budget if appropriate • Record details accurately • Identify names of attendees • Check availability of room/attendees • Check special dietary requirements etc. • Collate responses to identify most convenient date/s and liaise with line manager • Collate responses and liaise with colleagues to identify facilities required • Make a room booking and book facilities, taking account of budget if appropriate • Send clear written confirmation to venue if appropriate (e.g. if room used is external) including date, time, location, refreshment details and any special requirements/ equipment

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
2 Be able to produce documentation required for meetings	2.1 Produce a Notice of Meeting for specified meetings 2.2 Produce an agenda for specified meetings	<ul style="list-style-type: none"> • Liaise with line manager/colleague to obtain details for the agenda • Produce a notice of meeting from own notes, to include: heading; full date; time and location of meeting • Produce an agenda from own notes to include relevant items from standard agenda content: Heading; Apologies for absence; Minutes of last meeting; Matters arising; Correspondence; Any other business and Date of next meeting • Circulate documents to attendees allowing sufficient time to allow them to respond
3 Be able to keep accurate pre-meeting records	3.1 Produce a list of attendees for the meeting 3.2 Produce a list of apologies for absence received for the meeting	<ul style="list-style-type: none"> • Collate responses • Prepare a list of attendees • Update line manager/colleague on attendees
4 Be able to carry out pre-meeting checks and preparations	4.1 Perform pre-meeting checks and preparations 4.2 Provide all documents, items and facilities required for the meeting	<ul style="list-style-type: none"> • Carry out a final check to ensure that all booked facilities are available • Update orders to reflect any changes • Inform line manager / colleague of any changes and report action taken • Prepare badges and/or place names if required. • Reproduce any documents required for discussion/information. • Obtain security passes or follow other security procedures established by the organisation. • Produce an attendance list

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
5 Understand the need for confidentiality and compliance with the law	5.1 Describe ways in which documents can be distributed while maintaining confidentiality 5.2 Explain how meeting documents can be kept confidential and secure	<ul style="list-style-type: none"> • Keep written information secure by taking relevant precautions when preparing, reproducing and circulating documents. • Select methods of circulating documents, either electronically or in written form, appropriate to their sensitivity • Apply the Data Protection Act to the storage of data by ensuring that data is accurate, up-to-date, relevant and not kept for longer than necessary • Check, and comply with, copyright legislation before reproducing or transmitting documents that may be required for discussion or information at the meeting
6 Be able to distribute documentation following meetings	6.1 Circulate minutes and other meeting documents, in accordance with organisational procedures	<ul style="list-style-type: none"> • Reproduce and collate documents • Liaise with line manager to compile a distribution list • Distribute documents within a deadline and in accordance with organisational/security procedures

Assessment

This unit is assessed by the centre and sent to OCR for moderation.

Guidance on assessment and evidence requirements

This unit is assessed using a model assignment. OCR has produced a model assignment for each unit which centres may use for the purpose of assessment. The model assignment contains a scenario or real-life situation and related tasks which are based on the assessment criteria of the unit.

Centres may either use the model assignment as an entire, holistic assessment for an individual unit, adapt it to suit individual candidates' needs or devise their own assignment. If they choose to adapt the assignment or devise their own assignment they must ensure that the modified assignment will provide candidates with sufficient opportunity to demonstrate achievement of all the assessment criteria in the unit.

Please refer to the model assignment for this unit which can be found on the OCR website www.ocr.org.uk.

Additional information

For further information regarding administration for this qualification, please follow the link to [OCR's Administration area](#).