

Model Assignment

Issued September 2011

OCR Administration (Business Professional)

UNIT 14 (LEVEL 2) – HANDLING DIARY SYSTEMS

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
03956	OCR Level 2 Certificate in Administration (Business Professional)	500/6563/4
03957	OCR Level 2 Diploma in Administration (Business Professional)	500/6125/2
03958	OCR Level 3 Award in Administration (Business Professional)	500/6483/6
03959	OCR Level 3 Certificate in Administration (Business Professional)	500/6484/8
03963	OCR Level 3 Diploma in Administration (Business Professional)	500/6485/X

The QCA Accreditation Number for this unit is: T/502/3827

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

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G355 11-09

Model Assignment: Tutor Information

OCR Administration (Business Professional)

UNIT 14 (LEVEL 2) – HANDLING DIARY SYSTEMS

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. Managing a diary system effectively is an important administrative role. Learners will identify different diary systems, make diary entries, cancel existing entries, reschedule appointments and communicate appointments as appropriate. The scenario is based around a local leisure centre in which the learner is required to coordinate and manage the centre manager's diary.

The centre may wish to reproduce the diary entry provided (Appendix 1) in electronic format so that learners can type new entries or amend/delete existing records. Alternatively, centres may photocopy the diary entry provided to enable learners to use a paper-based diary to complete this assignment.

The tasks have been designed so that all of the assessment criteria in Unit 14 are addressed.

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

The Tasks

Task 1: Set up new entries

Assessment Criterion 2.1 is assessed in this task.

Learners will need to read and study Bob Watson's August diary (Appendix 1). They then need to understand how to set up new diary entries, establishing the purpose, date, time, attendees and location of the meeting.

Evidence for this task will be a correctly amended version of the August diary.

Task 2: Changing an entry

Assessment Criteria 2.1, 2.2, 3.1, 3.2 and 3.3 are assessed in this task.

Learners are asked to read an email requesting their manager's attendance at an important meeting. Learners will need to establish the purpose, date, time and location of the meeting. The learner should realise that there is an existing entry in the diary so they need to liaise with their manager as well as contact those affected.

A role-play, which the tutor would supervise, would confirm that the meeting with the accountant is more important and they now need to accurately enter the meeting into the diary. A role play would also confirm that the learner has contacted anyone else affected by the diary change but this part of the task may alternatively be evidenced through emails, memos or notes showing liaison with Bob, the accountant and anyone else affected.

Learners should be encouraged to thoroughly read and check diary dates, ensuring they liaise with attendees when unsure of commitments.

Evidence for this task should be an updated diary copy (handwritten or typed), a completed Witness Statement or email/note/memo to Bob and a brief email reply to the accountant.

Task 3: Reschedule changes to existing entries

Assessment Criteria 3.1, 3.2 and 3.3 are assessed in this task.

Learners need to be able to understand how to deal with changes to existing diary entries, record those changes, delete previous entries and communicate to the relevant parties effectively.

Learners need to reschedule two existing entries, locating suitable times and dates for the meetings. Existing entries must be deleted and learners will then communicate the agreed changes to those affected.

Evidence for this model assignment task should be generated from an updated diary copy (handwritten or typed), as well as a brief reply to their manager, confirming the entries have been changed.

Task 4: Handle requests

Assessment Criteria 2.1, 2.2, 3.1, 3.2 and 3.3 are assessed in this task.

Learners need to be able to understand how to handle requests from others for new diary entries. They will need to understand how to choose the most suitable date for all the attendees.

Learners are asked by the Regional Manager to coordinate the most suitable date and time for an important strategy meeting between Centre Managers, the learner's own Manager and the Regional Manager. Learners are given a collection of responses (Appendix 2) and together with their Manager's diary they need to read and decide upon the most suitable date for the meeting to be held.

Learners are then requested to confirm the chosen date to the Regional Manager so that a confirmation letter and agenda can be distributed by her Personal Assistant. Learners are encouraged to respond within a reasonable timescale and can choose either a memo, email or a brief note as an appropriate response.

Evidence for this model assignment task should be generated from an updated diary copy (handwritten or typed), as well as a brief response to the Regional Manager, confirming the most suitable date.

Task 5: Different types of diary systems

Assessment Criteria 1.1 and 1.2 are assessed in this task.

Learners need to understand the different types of diary systems and should consider various types of diary system, including paper-based and electronic. Learners should also describe how easily the diary system updates all users. Learners need to consider remote access and multiple users, as well as the confidentiality of entries.

Learners need to compare the diary system they have used for tasks 1, 2, 3 and 4 with a different system. Learners will identify and compare the advantages and disadvantages of an electronic diary and a manual diary including accessibility factors and confidentiality issues.

Evidence for this should be a report.

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. 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.

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 Set up new diary entries	<ul style="list-style-type: none"> • Updated version of the diary showing accurate entries 	Assessment Criteria <ul style="list-style-type: none"> • 2.1
Task 2 Change an existing diary entry	<ul style="list-style-type: none"> • Updated version of the diary showing accurate entries • Witness statement or emails showing liaison with Aziz and anyone else affected by changes • Witness statement or email/note memo showing liaison with Bob 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 3.1 • 3.2 • 3.3
Task 3 Reschedule changes to existing diary entries	<ul style="list-style-type: none"> • Updated version of the diary showing accurate entries • Email, memo or note 	Assessment Criteria <ul style="list-style-type: none"> • 3.1 • 3.2 • 3.3
Task 4 Handle requests	<ul style="list-style-type: none"> • Updated version of the diary showing accurate entries • Memo, email or note 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 3.1 • 3.2 • 3.3
Task 5 Different types of diary systems	<ul style="list-style-type: none"> • Report 	Assessment Criteria <ul style="list-style-type: none"> • 1.1 • 1.2

Witness Statement – Task 2

This form is to be used to testify or corroborate what has actually been observed.

Witnesses are people who can comment on work/performance/activities and can be:

- A qualified tutor/assessor
- Someone who has competence in the subject and a knowledge of the evidence requirements of the qualification.

AC 2.2 & 3.3	Task 2 – Changing an entry
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LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

Assessment Criterion 2.2	
Liaise with attendees when making diary entries including confirming final details	
Assessor comments	

Assessment Criterion 3.3
Communicate final diary details to those affected

**Assessor
comments**

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GENERAL COMMENTS

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I confirm that the learner above has achieved each of the Assessment Criteria listed whilst performing the tasks above.

Signed (Witness): _____

Name and position _____

Date: _____

Model Assignment: Learner Information

OCR Administration (Business Professional)

UNIT 14 (LEVEL 2) – HANDLING DIARY SYSTEMS

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). For some work, e.g. presentations, coaching sessions, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet could 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 is has your name and the unit title clearly marked and that it is in the correct order for assessing.

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.

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Scenario

Diary Action

You work as an administrator for Action Sports Fitness, a local leisure centre. You have worked for the centre for several years and one of your responsibilities is to provide administrative support to Bob Watson, who is the Centre Manager and your line manager.

Your duties include typing correspondence and reports, dealing with emails, membership registration, organising meetings and coordinating and handling diary commitments.

You also help the Regional Manager, Rajinder Patel and her Personal Assistant.

Action Sports Fitness
22 - 25 Golf Avenue
Brookmoor
Bath
BA9 6YB

Tasks

Introduction

In order to achieve this unit you are required to set up new diary entries, handle requests for new entries and deal with proposed changes to existing entries.

Task 1: Set up new entries

Assessment Criterion 2.1

You have just had a conversation with Bob and noted down three new entries which he would like you to add into his diary:

- 12 August 9 am -11 am, Annual Progress Review - Simon Shaw, Personal Instructor, Bob's office
- 13 August 9 am -11 am, Annual Progress Review - Claus Goldstein, Fitness Team Leader, Bob's office
- 20 August 9 am - 1 pm, United Fitness Equipment for a Sales Pitch, Treadmill Room

Your task is to:

- add these new entries into his diary.

Your evidence will be an amended version of Bob Watson's August diary (Appendix 1).

Task 2: Changing an entry

Assessment Criteria 2.1, 2.2, 3.1, 3.2 and 3.3

The Action Sports accountant, Aziz Gala, has sent you the following email.

To: administrator@actionsportsfitness.biz
 From: Aziz Gala
 Subject: Half Yearly Meeting

I am writing to inform you of the scheduled half yearly meeting to discuss the previous sales figures and look at future forecasts. The Ripples Hotel, Olympic Meeting room has been booked for 17 August. We will start with our usual breakfast meeting at 0800, lunch will be provided, as will refreshments during the day, we will aim to finish around 1730. The hotel has plenty of parking.

Please could you confirm, as soon as possible, if Bob Watson is available for this meeting. Please let me know if he has any special dietary requests.

Aziz Gala

Your task is to:

- check Bob’s diary commitment and liaise with him
- confirm the meeting with Aziz
- contact anyone else affected
- amend Bob’s diary.

Your evidence will be:

- a completed Witness Statement or email/memo/note showing that you have liaised with Bob Watson
- a completed Witness Statement or emails showing that you have confirmed the meeting with Aziz and contacted anyone else affected
- an amended version of Bob Watson’s August diary.

Task 3: Reschedule changes to existing entries

Assessment Criteria 3.1, 3.2 and 3.3

Bob and the Finance Manager, Connie, had planned a meeting on Tuesday 3 August 11 am to 3 pm which includes a working lunch. You have received the following email this morning.

From: Bob Watson
Subject: Diary changes

Can you reschedule my meeting with Connie on Tuesday 3 August, 1100 – 1500, to the next working day, same time please.

Also Sarah, our Children’s Activity Coordinator would like to change her meeting on 6 August – can you reschedule to sometime the following Friday and update me, so that I can send her an email.

Thanks.
Bob

Your task is to:

- update Bob’s diary
- reply to Bob’s request.

Your evidence will be an email, memo or note to Bob and an amended version of his August diary.

Task 4: Handle requests

Assessment Criteria 2.1, 2.2, 3.1, 3.2 and 3.3

The Regional Manager wants to hold a one-day meeting on a weekday in August to discuss a strategy to cope with the recession. The meeting will involve all Action Sports Fitness Centre Managers based in the South of England. She has asked that you coordinate this meeting and inform her of the most suitable date so that she can send out a confirmation letter and the agenda to all participants.

You know that Bob will not want to reschedule any dates in his diary that are already confirmed. You have had a response from the other four branch managers and know Rajinder's availability – see Appendix 2. Use these responses and your updated version of Bob's diary to select the most appropriate date.

Your task is to:

- identify a suitable date for a proposed meeting
- update Bob's diary
- produce a memo, email or note to Rajinder confirming the date.

Your evidence will be a memo, email or note to Rajinder, together with an amended version of Bob Watson's August diary.

Task 5: Different types of diary systems

Assessment Criteria 1.1 and 1.2

Bob does not feel that his current diary system is meeting his requirements. He would like a brief report on alternative diary systems. Compare the diary system you used for the previous tasks with a different type of system e.g. paper based and an electronic system.

Your task is to:

- research both diary systems and:
 - ✓ identify the advantages and disadvantages of both types of diary system
 - ✓ identify what was good about the diary system you used
 - ✓ compare confidentiality issues
 - ✓ compare accessibility factors

Your evidence will be a report.

Model Assignment: Learner Checklist

OCR Administration (Business Professional)

UNIT 14 (LEVEL 2) – HANDLING DIARY SYSTEMS

LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Updated version of the diary showing accurate entries	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Updated version of the diary showing accurate entries	
<input type="checkbox"/> Witness Statement	
<input type="checkbox"/> Email/note/memo	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Updated version of the diary showing accurate entries	
<input type="checkbox"/> Email/note/memo	

Task 4 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Updated version of the diary showing accurate entries	
<input type="checkbox"/> Email/note/memo	

Task 5 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Report	

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: _____

Action Sports Fitness							Centre Manager's Diary – Bob Watson						
August													
Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday	
26		27		28		29		30		31		1	
2 Wkly Team Mtg 0900-0930 Olympic Rm Review month ahead with team Dentist – 1600		3 0900 – 1100 Interviews for fitness instructor Meeting with the Finance Manager 1100 – 1500 to review budgets, working lunch needed		4		5 Delivery of chair/tables and medals for open day		6 0900 – 1000 Children's Activity Co-ordinator – Meeting All Staff Meeting – Preparation for Open Day 1330 - 1530		7 Open Day Event 0900 - 1600		8	
9 Wkly Team Mtg 0900-0930 Olympic Rm Collection of chair/tables		10		11 Health and Safety Inspection 0900 - 1200		12		13		14		15	
16 Wkly Team Mtg 0900-0930 Olympic Rm September Rota deadline		17 Lunch with Claus		18		19 Pay claim deadline - check and signature		20 Winter rota planning with fitness instructors 1500 - 1700		21		22	
23 HOLIDAY		24 HOLIDAY		25 HOLIDAY		26 HOLIDAY		27 HOLIDAY		28 HOLIDAY		29 HOLIDAY	
30 AUGUST BANK HOLIDAY CLOSED		31		1		2		3		4		5	

All Centre Managers have received an email regarding their availability in August. Their replies and Rajinder Patel's availability are listed below:

To: administrator@actionsportsfitness.biz
From: Orla O'Brien
Subject: RE: Proposed Strategy Review - August

In response to your email my availability for August is 6, 9 and 31, as I shall be on holiday for nearly 3 weeks in August. Sorry I do not have many dates to offer you.

Manager, Swindon Action Sports Fitness

To: administrator@actionsportsfitness.biz
From: Geraint Lewis
Subject: RE: Proposed Strategy Review - August

I am available all dates with the exception of 3 and 9 August and the Bank Holiday.

Manager, Taunton Action Sports Fitness

To: administrator@actionsportsfitness.biz
From: Bjorn Christensen,
Subject: RE: Proposed Strategy Review - August

Thanks for your message. I am available from the 23 August onwards as I am on annual leave before this date. I am also free most of September.

Manager, Cirencester Action Sports Fitness

To: administrator@actionsportsfitness.biz
From : Rupert Fletcher
Subject: RE: Proposed Strategy Review – August

My availability is good for August, with the exception of 18, 19, 20 and 23.

Manager, Cheltenham Action Sports Fitness

Rajinder Patel's availability

I am available to attend the Strategy Review Meeting on the following dates:

2 – 6 August
9 – 11 August
18 – 20 August
23 – 28 August
31 August