

Model Assignment

Issued September 2011

OCR Administration (Business Professional)

UNIT 27 (LEVEL 4) - CHAIR A MEETING

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)
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
03966	OCR Level 4 Award in Administration (Business Professional)	500/6488/5
03967	OCR Level 4 Certificate in Administration (Business Professional)	500/6489/7
03968	OCR Level 4 Diploma in Administration (Business Professional)	500/6490/3

The QCA Accreditation Number for this unit is: Y/502/3867

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

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G368 11-09

Model Assignment: Tutor Information

OCR Administration (Business Professional)

UNIT 27 (LEVEL 4) - CHAIR A MEETING

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. In this assessment learners will chair a meeting. They will need to work closely with the administrative assistant or other member of staff providing the administrative support for the meeting. (This could be cross-referenced with Unit 19, Support Business Meetings.)

The assessment for this unit may be carried out as a role play using the attached scenario, or alternatively the tasks may be carried out in a real meeting within the workplace. Whichever method is used, the meeting must include at least five people including the Chair and should last at least 30 minutes. If a real meeting is used to generate evidence, tutors must ensure that the demands and level of the meeting match those in the scenario provided.

To be successful in this unit, learners will need to open the discussion, encourage participation, summarise and clarify discussion points and agree the distribution of the minutes.

The tasks have been designed so that all of the assessment criteria in Unit 27 are addressed.

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

The Tasks

Task 1: Act as Chair for the meeting

Assessment Criteria 1.1, 1.2, 1.3, 1.4, 1.5, 1.6 and 1.7 are assessed in this task.

In this task learners will first review the documentation that they have been given to support the meeting.

Learners have been provided with a scenario which gives information about the meeting and the different people who will attend. This information will also be needed to set the meeting up as a simulation and the tutor should allocate suitable roles and responsibilities for all participants to enable the learner to meet the requirements of this unit.

The learner who acts as Chair must take responsibility for carrying out the activities mainly unsupervised. The learner will manage the meeting time effectively and ensure that all agenda items are discussed. Some items that may produce conflict have deliberately been added to the agenda and scenario so that the Chair has to deal with this conflict appropriately. The Chair should take notes during the meeting and then liaise with the meeting secretary to confirm that the minutes taken are accurate and correct.

Following the meeting the Chair will check and agree the draft minutes for distribution.

Evidence will be the agenda, minutes, a Witness Statement or video evidence and the learner's notes.

Task 2: Evaluate own performance as Chair

Assessment Criteria 2.1 and 2.2 are assessed in this task.

In this task, learners will carry out a self assessment and evaluate their own performance as Chair. Learners could carry out a SWOT/SLOT analysis identifying their strengths, limitations, opportunities and threats as Chair. They should identify what went well, what could be improved upon and whether the objectives of the meeting were achieved.

Learners should ask for peer feedback and this should be adequately supervised so that it is supportive and constructive rather than destructive. Peers should be asked to suggest how they feel the Chair handled the discussions, timings and overall objectives of the meeting.

As supervisor, it would be helpful for you to hold a de-briefing session with the Chair and also provide them with feedback on their performance.

Learners should then compare their own ideas with that of their peers and supervisor. They should then capture all the feedback and identify and recommend areas for improvement in a formal review.

Evidence must be the review and feedback but could also include a CPD log.

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. The model assignment can be contextualised or amended to suit the circumstances of the individual learner. However, the tasks 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 Act as Chair for the meeting	<ul style="list-style-type: none"> • Agenda • Minutes • Witness Statement or video • Notes 	<ul style="list-style-type: none"> • 1.1 • 1.2 • 1.3 • 1.4 • 1.5 • 1.6 • 1.7
Task 2 Evaluate own performance as Chair	<ul style="list-style-type: none"> • Review • Feedback • CPD log 	<ul style="list-style-type: none"> • 2.1 • 2.2

Witness Statement – Task 1

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 1.1, 1.2, 1.3, 1.4, 1.5, 1.6 & 1.7	Task 1 - Act as Chair for the meeting
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LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

Assessment Criterion 1.1 Extrapolate agenda items for a business meeting	
Assessor comments	
Assessment Criterion 1.2 Chair a meeting promoting delegate participation to ensure that key issues are considered	
Assessor comments	

Assessment Criterion 1.3	
Manage timing of the meeting to ensure that all agenda items are discussed	
Assessor comments	
Assessment Criterion 1.4	
Deal with disagreements and conflict during the meeting	
Assessor comments	
Assessment Criterion 1.5	
Summarise discussions and decisions and close the meeting	
Assessor comments	
Assessment Criterion 1.6	
Check draft minutes of the meeting	
Assessor comments	

Assessment Criterion 1.7 Agree draft minutes with minute secretary	
Assessor comments	

GENERAL COMMENTS

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 27 (LEVEL 4) - CHAIR A MEETING

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

Chairing a Meeting

You are currently working as the Practice Administrator for the Westchester GP Surgery. Abzar is the Practice Manager. Abzar is due to go on holiday to New Zealand for six weeks and he has asked you to act as Chair for the next staff development meeting in three weeks time.

The meeting takes place bi-monthly, and reviews staff training requirements and progress towards the Continuous Professional Development (CPD) action plans of staff within the Practice. There is only limited funding for staff training which must be shared across the teams.

The meeting will consist of you (the Chair), Simon Readings (the minute taker), and four team managers; Sally Godstone (Accounts), Hans Mader (Reception), Clara Rosario (Nursing) and Dr Sarah Baines, who represents the other GPs in the practice. The meeting should be scheduled to last for 30 minutes.

Abzar has given you a copy of the minutes of the previous meeting (Appendix 1). He has also provided you with an updated list of attendees and some notes including items that have been passed to him by the team regarding next meeting's agenda (Appendix 2).

Abzar has advised you that the annual training budget will be available next month, and the meeting needs to include agreement for the division of the budget across the teams. Clara has suggested an agenda item, but Abzar feels it is not appropriate for discussion at the meeting. However, Clara might still attempt to raise the issue during the meeting.

Tasks

Task 1: Act as Chair for the meeting

Assessment Criteria 1.1, 1.2, 1.3, 1.4, 1.5, 1.6 and 1.7

Your task is to:

- review the documentation you have been provided with and agree and decide agenda items.
- act as Chair for the meeting, managing time effectively to ensure that all agenda items are addressed.
- check and agree draft minutes for distribution.

Your evidence will be:

- the agenda
- the minutes
- a Witness Statement or video
- your notes (not the official minutes)

Task 2: Evaluate own performance as Chair

Assessment Criteria 2.1 and 2.2

Your task is to:

- evaluate your own performance as Chair.
- identify and recommend areas for improvement.

Your evidence will be:

- your review
- feedback you have received

Your evidence may also include a CPD log.

Appendix 1 - Minutes of the last meeting

**Westchester GP Surgery
Minutes
3rd March: 10.00 am**

The bi-monthly meeting of the Team Managers' Staff Development Committee took place on 3rd March at 10.00 am in Room 1.

Administration
(tel: 6234)

1 Welcome

Abzar welcomed everyone to the meeting. Clara had just been appointed as the Staff Development Representative for the nurses and this was her first meeting.

2 Apologies

There were no apologies for absence.

3 Minutes of the last meeting

These were agreed.

4 Matters Arising

There were no matters arising from previous minutes.

5 CPD Plans

Abzar reminded staff that all CPD plans had to be completed and submitted by the 31st March to show the activities that have been undertaken during the previous financial year. It was an annual requirement for all staff to do this. Currently the submission was paper-based and all staff were required to complete form CPD11 and pass to their manager by the 20th of the month so that the manager has time to confirm the entries and pass to the Practice Manager by the 31st March. It was agreed that any staff who had started after the 31st January would not be included in the March submission.

6 Staff Training Requirements

There had been three requests from staff to undertake financial processing courses. The Practice had investigated this and it was felt that the cost was too great to send the staff on a course with a local training provider. One provider had quoted £1500 per delegate. It had been noted that the staff requesting this training were from the Accounts team and it was agreed that the staff involved could undertake in-house training. It was agreed that Sally would be allowed to close the office for 30 minutes on a Wednesday morning, preferably from 9.00 - 9.30 am so that the training could take place over a period of three months. Sally to draw up a suitable training programme based on her staff's requests and to pass to the Practice Manager for approval. Clara requested that two new nurses needed to be trained on the patient management

system and it was agreed that this training course be run by Clara and should be outside of patient appointment times.

7 Agreement of Annual Budget

Team managers were reminded that at the next meeting, a discussion would take place to agree the distribution of the annual training budget. It was agreed that team managers would find out the future training requirements requested by their staff so that they could present their own case for a fair distribution of the funds.

8 Update on electronic recording of CPD

The Practice Manager advised that an electronic recording of CPD would be piloted from the 1st April and it was expected that for the first quarter the team managers would take part in this pilot. The software "Contemplate" had been installed onto the relevant machines and staff should login and start uploading their data. A demonstration was provided on how the system would work and information packs given out which included login and password to access the system.

9 Any other business

There was no other business.

10 Date and time of next meeting

3rd May at 10.00 am – Room 1.

Appendix 2 - Notes from Abzar about the next meeting

- Remember to include standing items.
- Matters arising – remember to ask how the accounting course is going and how staff are finding it.
- CPD plans – report that all but one CPD plan has been received. Report on the quality of information received and remind Dr Baines that Dr Khan has still not submitted his CPD plan.
- Clara would like to raise a point about Staff Development and how the nurses are expected to do it out of “contracted hours” and the accounts team don’t – this shouldn’t be added to the agenda as an item.
- First aid training for non-medical staff – the Red Cross is carrying out annual updating and has asked if they can carry out the training on the 25th July.

Learner Evidence Checklist

OCR Administration (Business Professional)

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LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Agenda	
<input type="checkbox"/> Minutes	
<input type="checkbox"/> Witness Statement	
<input type="checkbox"/> Video	
<input type="checkbox"/> Notes	
<input type="checkbox"/> Other (please give details) _____	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Review	
<input type="checkbox"/> Feedback	
<input type="checkbox"/> CPD log	
<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: _____