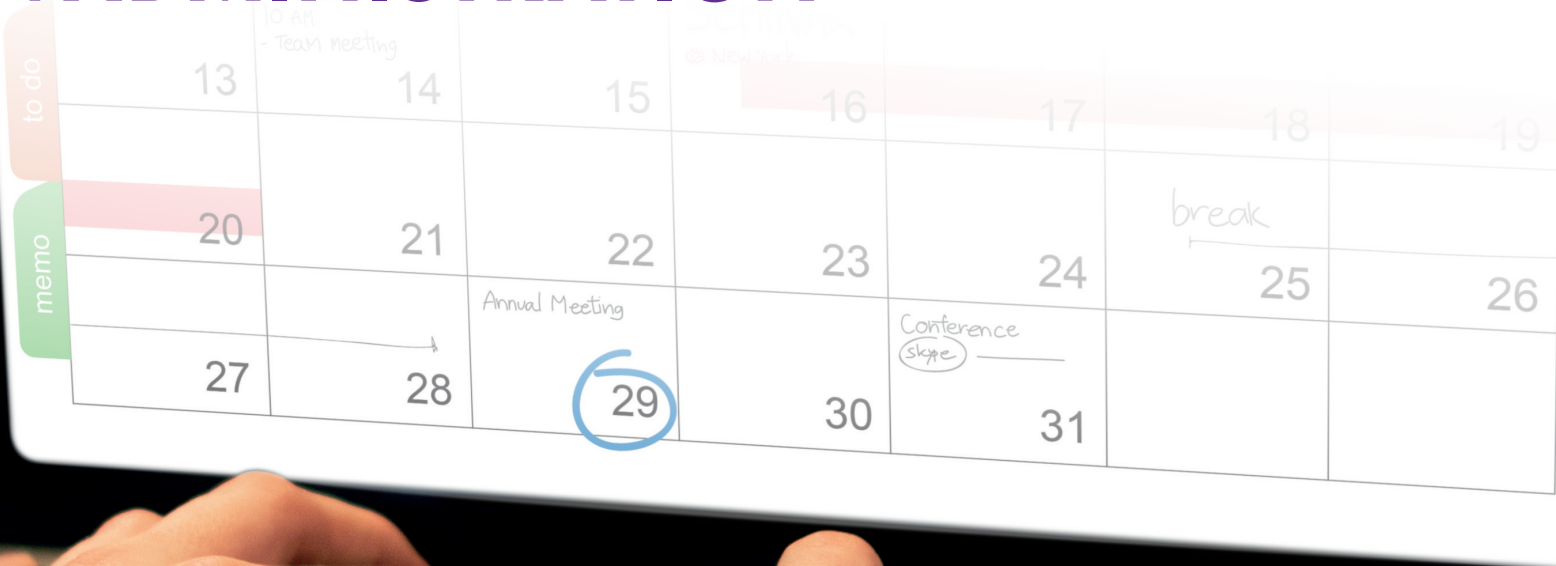BTEC Level 2 Technical Certificate in

BUSINESS ADMINISTRATION

BTEC

SPECIFICATION

First teaching: September 2017 | First certification: Summer 2018

ISSUE 3

Pearson

Pearson BTEC Level 2 Technical Certificate in Business Administration

Specification

First teaching September 2017

Issue 3

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 3. Key changes are listed in the summary table on the page after next of the document. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

References to third-party material made in this specification are made in good faith. We do not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

Welcome

With a track record built over 30 years of learner success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace, either directly or via study at higher levels. Proof comes from YouGov research, which shows that 62% of large companies have recruited employees with BTEC qualifications.

Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure. In these new BTEC Level 2 Technicals, the focus is on the development of technical, practical and transferable work-related skills, and sector-specific knowledge. The development of these skills is key for learners to progress to work or to an Apprenticeship.

When creating the BTEC Level 2 Technicals, we worked with employers to ensure that the qualifications meet their needs. Employers are looking for recruits with the appropriate technical knowledge, and technical and transferable skills essential for employment.

The BTEC Level 2 Technicals meet these requirements through:

- a range of occupationally-related qualifications, each with a clear purpose, so that there is a qualification to suit each learner's plan for career progression
- up-to-date content that is closely aligned with employers' needs for a skilled future workforce
- assessments and projects chosen to help learners progress to the next stage. This means that some assessments and projects are set by the centre to meet local needs, while others are set and marked by Pearson. This ensures that there is a core of skills and understanding common to all learners. For example, an externally-set test can be used to check that learners are confident in using technical knowledge to carry out a certain job.

We provide a wealth of support, both resources and people, to ensure that learners and their tutors have the best possible experience during their course. See *Section 11 Resources and support* for details of the support we offer.

A word to learners...

BTEC Level 2 Technicals will demand a lot of practical work from you. You will need to:

- complete a range of units
- be organised
- take some assessments that Pearson will set and mark
- take other assessments that will demonstrate your technical and practical skills
- keep a portfolio of your assignments.

But you can feel proud to achieve a BTEC because, whatever your plans in life – whether you decide to go on to work or to an Apprenticeship – success in your BTEC Level 2 Technical qualification will help you to progress to the next stage in your life.

Good luck, and we hope you enjoy your course.

Collaborative development

Learners completing their BTEC Level 2 Technicals will be aiming to go on to employment or to an Apprenticeship. It was essential therefore that we developed these qualifications in close collaboration with experts from professional bodies and businesses, and with the providers who will be delivering the qualifications. We are grateful to all the further education lecturers, tutors, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers and professional bodies that have worked with us include:

BT Group

Chartered Institute of Personnel and Development (CIPD)

Chartered institute of Procurement & Supply (CIPS)

C&T Restaurants Ltd (trading as McDonald's).

In addition, professional bodies and businesses have provided letters of support confirming that these qualifications meet their recruitment requirements. These letters can be viewed on our website.

Summary of Pearson BTEC Level 2 Technical Certificate in Business Administration specification Issue 3 changes

Summary of changes made between the previous issue and this current issue	Page number
The wording in *Section 8 Teacher/centre malpractice* has been updated to clarify suspension of certification in certain circumstances.	Pages 83, 84
The wording under *Section 10 Understanding the qualification grade* has been updated to clarify current practice in ensuring maintenance and consistency of qualification standards.	Page 88

Contents

Pearson BTEC Level 2 Technicals

Introduction

BTEC Level 2 Technicals are intermediate qualifications for post-16 learners who want to specialise in a specific occupation, occupational area or technical role. They prepare learners for work or an Apprenticeship by giving them the opportunity to develop sector-specific knowledge, technical and practical skills, and to apply these skills in work-related environments. The qualifications also provide progression to Level 3 Tech Level qualifications.

Developed in close conjunction with leading employers, BTEC Level 2 Technicals develop transferable workplace skills, such as good communication and the ability to work in a team, which employers have identified as essential for gaining employment in the sector and for progression once the learner is working.

At the core of these qualifications is the concept of preparing young people for the working world. Through practical activities and occupationally-fit-for-purpose assessments, learners will gain the skills and behaviours needed for sustainable employment.

BTEC Level 2 Technicals are designed to be used flexibly, depending on their size and scope:

- as part of a full-time 16–19 study programme, alongside mathematics and English GCSEs and/or Functional Skills, work placement and enrichment activities
- as the technical qualification within an Apprenticeship or off-the-job training for those already in work
- as a roll-on, roll-off programme for those entering an Apprenticeship or employment.

Pearson has developed the BTEC Level 2 Technicals suite to meet the Department for Education (DfE) requirements for qualifications to be offered as Technical Certificates for 16–19 year olds.

This specification contains the information you need to deliver the Pearson BTEC Level 2 Technical Certificate in Business Administration 603/0481/9. The specification signposts you to additional handbooks and policies. It includes all the units for this qualification.

This qualification is a part of the BTEC Level 2 Technicals suite for the business sector.
Other BTEC Level 2 Technicals available for this sector currently include the:

- Pearson BTEC Level 2 Technical Certificate in Retail Operations 603/0478/9
- Pearson BTEC Level 2 Technical Certificate in Business Enterprise 603/0482/0

1 Pearson BTEC Level 2 Technical Certificate in Business Administration

Purpose

Who is the qualification for?

This qualification is for learners who want to start a career in business and professional administration. It is designed for post-16 learners and can be taken as part of a wider study programme. It is an ideal qualification for learners who are intending to progress directly to employment in an administrative role, or to a business administration Apprenticeship.

What does the qualification cover?

This qualification has been developed in consultation with cross-sector employers to ensure it enables learners to develop the skills and behaviours that will give them the best opportunity to be successful when applying for work.

All the content of the qualification is mandatory and relates directly to the skills, knowledge and behaviours expected by employers in a business administration role. The areas covered include:

- business administrative environment
- providing administrative services and support
- business technology
- processing and communicating information.

Learners will also enhance their broader skills in literacy and numeracy, which will be invaluable in supporting progression in other areas. In addition, they will develop transferable technical and practical skills in communication, decision making, self-management and development, problem solving and managing information.

What could this qualification lead to?

Achieving this qualification will give learners an advantage when applying for a job in business administration. The types of role they will be ready for are:

- business administrator
- administrative assistant
- office administrator.

When studied as part of a full study programme, this qualification also gives learners a sound basis to progress further in a business administrative role, and to a Level 3 qualification such as a Pearson BTEC Level 3 National Extended Diploma in Business, a Pearson BTEC Level 3 National Diploma in Enterprise and Entrepreneurship or a BTEC Level 3 Diploma in a Tech Level qualification.

About the business sector

Approximately 3.2 million people in the UK are employed in an administrative and secretarial role, mainly based in sectors such as public administration, education, health, finance and professional services.

The roles in business administration can be varied across the sector. However, employers expect their administrative staff to be multi-skilled, with technical and practical administration skills that include an increased focus on service delivery, both in the workplace and digitally.

Careers in business administration offer a fantastic progression pathway into a number of roles throughout an organisation, and the skills you can develop are highly transferable across all industries.

2 Structure

Total Qualification Time (TQT)

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated learners will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

The Pearson BTEC Level 2 Technical Certificate in Business Administration is a qualification that has:

• Total Qualification Time: 325 hours

• Guided Learning: 240 hours.

Centres should take note of these hours in planning their programme but should also use their professional judgement to determine the provision of guided learning and study time across the units.

Qualification structure

Learners are required to complete and achieve all the units included in this qualification.

Pearson BTEC Level 2 Technical Certificate in Business Administration				
Unit number	**Unit title**	**GLH**	**Type**	**How assessed**
1	Understanding Administrative Services	**60**	Mandatory	External
2	Providing Administrative Services	**60**	Mandatory	Internal
3	Using Business Technology to Process and Communicate Information	**60**	Mandatory	Internal
4	Planning, Organising and Supporting Business Events	**60**	Mandatory	Internal Synoptic

This qualification has 100% mandatory content and 25% external assessment.

Qualification and unit content

Pearson has developed the content of this qualification in collaboration with employers and representatives from relevant professional bodies. The content has been aligned to the Business and Administration National Occupational Standards and the Trailblazer Business Administrator Apprenticeship Standard. In this way, we have ensured that content is up to date and that it includes the knowledge, technical and practical skills and behaviours required to work in the sector and occupational area.

All units in this qualification are mandatory, which provides a balance of breadth and depth, ensuring that all learners develop the technical and practical skills required in the occupational area. Learners are then offered the opportunity to develop a range of transferable skills and attributes expected by employers. It is expected that learners will apply their learning to relevant employment and sector contexts during delivery and that they will have opportunities to engage meaningfully with employers.

BTECs have always required applied learning that brings together knowledge and understanding (the cognitive domain) with practical and technical skills (the psychomotor domain). This is achieved through learners performing practical, work-related tasks that encourage the development of appropriate work-related behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork, and planning and completing tasks to high standards, all of which are valued in the workplace.

Our approach provides rigour and balance and promotes the ability to apply learning immediately in new contexts.

Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in (if teaching outside of England), or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver subject to confirmation by your Standards Verifier.

Assessment

Assessment is designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to skills and occupationally-based qualifications at this level.

External assessment

In this qualification, there is one external assessment, which assesses a unit that contributes contributes 25% of the total qualification GLH. The external assessment for this qualification takes the form of an onscreen test that includes a variety of question types and allows learners to apply their knowledge to several work-related contexts. The external assessment is linked to *Unit 1: Understanding Administrative Services*, as indicated in the qualification structure on the previous page.

This method of assessment has been used to externally assess this unit because it is best suited to draw out the evidence to exemplify the expectations of the unit. The purpose of this unit is for learners to develop the fundamental knowledge and understanding of a range of administrative activities, the requirements to be met in completing these and the context in which these activities are carried out. The use of this method of assessment allows for learners to demonstrate the range of abilities represented in the unit Assessment Outcomes to provide sufficient evidence that they have achieved the unit purpose. As the assessment is designed to measure the full range of thinking skills in the Assessment Outcomes it will differentiate learners' performance across the full grade range.

The external assessment is taken under specified conditions, then marked by Pearson and a grade awarded. Learners must achieve the external unit at Pass grade or above to achieve the qualification. Learners are permitted to resit the external assessment once during their programme by taking a new assessment.

For further information on external assessment see *Section 7 External assessment*.

Internal assessment

Units 2, 3 and *4* are assessed through internal assessment. Internal assessment allows learners to apply technical knowledge and demonstrate mastery of practical and technical skills through realistic tasks and activities. This style of assessment promotes deep learning through ensuring the connection between knowledge and practice.

Internal assessment is through assignments that are subject to external standards verification. We provide suggestions in each unit for setting assignments. This means that you can adapt materials to your local contexts and assess assignments that provide the valid and rigorous final assessment for each unit.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners must achieve all the internal units at Pass grade or above to achieve the qualification. For further information on internal assessment, including resubmissions, see *Section 6 Internal assessment*.

Synoptic internal assessment

There is one internal unit that provides the main synoptic assessment for this qualification. This synoptic assessment is designed to take place towards the end of the programme and draws on the learning throughout. The design of this assessment ensures that there is sufficient stretch and challenge, enabling the assessment of sector-related knowledge and technical and practical skills at the end of the learning period.

The synoptic assessment for this qualification is based on *Unit 4* and takes the form of a vocational activity where learners have to plan, organise and support a business event, such as a meeting or training session, in a realistic work environment. In completing this synoptic assessment, learners will apply the underpinning knowledge and understanding developed in *Unit 1*, and will also select and apply the knowledge and skills developed in *Units 2* and *3* that are appropriate for the activities to be carried out in planning, organising and supporting the specified business event.

In delivering the unit, you need to encourage learners to draw on their broader learning so that they are prepared for the assessment.

Language of assessment

Assessment of the internal and external units for this qualification will be available in English. All learner work must be in English. A learner taking the qualification may be assessed in British sign language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 8 Administrative arrangements*.

Grading of the qualification

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of the practical skills required for employment in the specific sector and successful development of transferable skills.

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. All units in the qualification contribute proportionately to the overall qualification grade.

The qualification is graded using a scale of P to D. Please see *Section 10 Understanding the qualification grade* for more details.

The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualification.

Employer involvement

Employer involvement in the delivery and/or assessment of technical qualifications provides a clear 'line of sight' to work, enriches learning, raises the credibility of the qualification in the eyes of employers, parents and learners, and furthers collaboration between the learning and skills sector and industry.

You need to ensure that all learners have the opportunity to undertake meaningful activity involving employers during their course.

Examples of 'meaningful activity' include:

- structured work experience or work placements that develop skills and knowledge relevant to the qualification/industry
- project(s), exercise(s) and/or assessments/examination(s) set with input from industry practitioner(s)
- units delivered or co-delivered by an industry practitioner(s); this could take the form of masterclasses or guest lectures
- industry practitioners operating as 'expert witnesses' that contribute to the assessment of a learner's work of practice, operating within a specified assessment framework. This may be a specific project(s), exercise(s) or all assessments for a qualification.

Meaningful employer involvement, as defined above, must be with employers from the business administration sector and must contribute significantly to at least one mandatory unit.

For this qualification, *Unit 2: Providing Administrative Services* has specified requirements for employer involvement in delivery and/or assessment.

This unit must be completed with involvement of employers. It is strongly recommended that learners take part in work experience as the best way of enabling them to complete the unit and facilitate assessment. A simulation set in a realistic scenario may be used as an alternative to work experience, in which case centres must involve employers, for example through observing learners' performance in realistic situations. Please see the units for further information.

We have also provided suggestions in other units on how employers could become involved in the delivery and/or assessment of this qualification.

These units are listed below.

- Unit 3: Using Business Technology to Process and Communicate Information
- Unit 4: Planning, Organising and Supporting Business Events

These are suggestions only and there will be other possibilities at local level. Centres may choose to use other approaches but must ensure that these meet the requirement for meaningful employer involvement as defined above. Centres must have an employer involvement plan in place at the start of the programme. It must detail their approach to employer involvement and how it will add value to the delivery and assessment of the qualification.

Each centre's approach to employer involvement will be monitored in two ways. It will be monitored at centre level as part of the annual quality management review process and captured as part of the standards verification process that addresses centre strategy for delivery, assessment and quality assurance, when we will ask you to show evidence of how employer involvement is provided for all learners. You will need to show evidence in order to gain reporting clearance for certification. It will also be monitored at programme level as part of the standards verification process to confirm that plans for employer involvement meet the requirements of the specification. These approaches are designed to ensure that additional activities can be scheduled where necessary so that learners are not disadvantaged, see *Section 9 Quality assurance*.

3 Units

Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment. The units help you to undertake assessment and quality assurance effectively.

Each unit in the specification is set out in a similar way. There are two types of unit format:

- internal units
- external units.

This section explains how the units work. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme read and are familiar with the information given in this section.

Internal units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See *Section 2 Qualification structure* for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See *Section 2 Qualification structure* for details.
GLH	Units have a value 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where learners should be developing and demonstrating their skills or where they should be actively researching or reviewing.
Unit summary	This section helps tutors to see at a glance the main content areas against the learning aims and the structure of the assessment. The forms of evidence given are suitable to fulfil the requirements.
Content	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.' Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.

Section	Explanation
Assessment criteria	Each learning aim has assessment criteria to explain the achievement required to obtain Pass, Merit and Distinction grades.
Essential information for assessment decisions	This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification. It is important that this is used carefully alongside the assessment criteria.
Assessment activity	This section provides information, suggested scenarios and tasks for summative assessment activities.
Further information for tutors and assessors	The section gives you information to support the delivery and assessment of the unit.
Delivery guidance	This section offers suggestions of ways of delivering the unit. It offers ideas on practical activities in a sector context that can be used to help develop relevant skills and to encourage progress.
Essential resources	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see *Section 11 Resources and support*.
Links to other units	This section shows you the main relationships of units to other units. This can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

External units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See *Section 2 Qualification structure* for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See *Section 2 Qualification structure* for details.
GLH	Units have a value of 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
Summary of assessment	This sets out the type of external assessment used and the way in which it is used to assess achievement.
Assessment outcomes	These show the hierarchy of knowledge, understanding, skills and behaviours assessed. For tested units, they include information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
Essential content	For external units all the content is obligatory, the depth of content is indicated in the assessment outcomes and sample assessment materials (SAMs). The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
Grade descriptors	We use grade descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
Key terms typically used in assessment	These definitions will help you to analyse requirements and to prepare learners for assessment.
Links to other units	This section shows the main relationships of units to other units. This section can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

Units

This section contains all the units developed for this qualification.

Unit 1: Understanding Administrative Services

Level: **2**

Unit type: **Mandatory**

Assessment type: **External**

Guided learning hours: **60**

Unit in brief

Learners develop their knowledge and understanding of a range of administrative support tasks.

Unit introduction

Every organisation needs efficient administrative support and the role of a business administrator is a varied one. In a large organisation, you may be working as part of a large team where you will be carrying out a clearly defined role, but in a smaller organisation your role may be a combination of roles, for example a receptionist who may be required to handle incoming and outgoing mail.

Whatever the size of the organisation, you will be required to know and understand a number of key tasks. These may include arranging travel, organising meetings, using office equipment, storing documents and managing mail services. All of these tasks will bring you into contact with other people so you need to understand the importance of working with others.

Every organisation has to adhere to legislation and you will need to know how this legislation affects your organisation and impacts on your role. Each organisation operates within a business structure and you will gain knowledge of these organisational structures. The knowledge and understanding you develop in this unit will help prepare you for progression to employment in business administration.

Summary of assessment

This unit is assessed using an onscreen test, set and marked by Pearson. The test contains different types of question and is worth 60 marks. The test duration is 75 minutes. The assessment is available on demand. The first assessment is available in January 2018.

Sample assessment materials will be available to help centres prepare learners for assessment.

UNIT 1: UNDERSTANDING ADMINISTRATIVE SERVICES

Assessment outcomes

AO1 Demonstrate knowledge and recall of administrative services facts, key terms and definitions

Command words: complete, explain, give, identify, match, name, outline, state

Marks: ranges from 1 to 2 marks

AO2 Demonstrate understanding and application of administrative services and how working relationships contribute to an effective business

Command words: complete, explain, identify, outline

Marks: ranges from 1 to 4 marks

AO3 Be able to assess or analyse information, make connections for administrative services and the legal framework in which an organisation operates

Command words: analyse, assess, discuss, explain

Marks: ranges from 1 to 6 marks

AO4 Be able to assess or evaluate information on administrative services, suggesting/providing solutions, selecting and using appropriate evidence to support arguments and ideas from several sources, and providing arguments in familiar and unfamiliar contexts

Command words: assess, discuss, evaluate, explain

Marks: ranges from 1 to 6 marks

Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

A   The different administrative roles and services

Understanding how to carry out these key roles and the importance of efficient planning.

A1 Providing administrative support for meetings

Understanding how to plan, prepare and assist before, during and after a meeting.

- Arranging and confirming date and time.
- Booking venue – internal or external, appropriate size, cost, keeping within budget.
- Inviting attendees.
- Circulating agenda and required documents.
- Arranging refreshments.
- Arranging equipment.
- Greeting attendees.
- Ensuring health and safety of attendees.
- Ensuring security of equipment and information.
- Providing support during meeting.
- Taking minutes, gaining approval of minutes, circulating minutes.

A2 Using different types of office equipment

Knowledge of the uses of different office equipment, assessment of a range of factors and application of this knowledge to appropriate tasks.

- Computer:
  - o purpose – preparing documents, internal/external communication, electronic diary management, distributing documents, storing documents, video calls
  - o factors to consider – safety, cost, security.
- Printer:
  - o purpose – producing hard copy of documents
  - o factors to consider – volume of work/number of users, quality of hard copy, need for monochrome or black and white copies, cost of printer and ink, size, location.
- Photocopier/scanner:
  - o purpose – duplicating documents, scanning hard copy documents
  - o factors to consider – volume of work/number of users, quality of hard copy, cost, size, location.
- Telephone system:
  - o purpose – internal/external communication, transferring calls, conference calls
  - o factors to consider – cost, volume of calls, landline or mobile telephones.
- Franking machine:
  - o purpose – applying postage to outgoing mail
  - o factors to consider – cost, location, size.
- Shredder:
  - o purpose – destroying confidential documents
  - o factors to consider – safety, secure disposal of shredded waste, location, size, volume of documents to destroy.

A3 Using different types of mail services

Understanding the differences between mail services and assessing the advantages and disadvantages of their usage. Factors to consider for:

- 1st class mail – importance of document, speed of delivery, cost, location of recipient
- 2nd class mail – speed of delivery, cost, location of recipient
- international mail – speed of delivery, cost, location of recipient
- special delivery – security, speed of delivery, cost, location of recipient, value of package, insurance for cost of replacement
- courier services – security, speed of delivery, cost, location of recipient, value of package, insurance for cost of replacement
- internal mail – security, location of recipient.

A4 Arranging business travel

Familiarity with the choices for business travel, knowing and understanding how travel is to be arranged efficiently, and assessing how and why problems arise and the impact of these on the traveller and the business.

- Types of travel:
  - air – economy, business class, methods of booking (airline's website, travel agent)
  - train – standard, first class, Eurostar
  - ferry – foot passenger, car
  - car – personal vehicle, hire car, pool car, taxi.
- Arrangements:
  - confirming dates and times with traveller
  - confirming budget
  - departure and destination points
  - passport and/or visa requirements
  - supplying itinerary to traveller
  - supplying all necessary documents
  - keeping accurate records.
- Problems:
  - communication
  - delays/cancellations
  - accidents
  - lack of resources.
- Impact of problems:
  - damage to reputation (self, business)
  - loss of business
  - wasted resources (time, money).

A5 Storing business documents

Understanding why the security of information is important and how to protect and store both electronic and paper-based documents.

- Security and confidentiality: data protection, restricted access, legislation affecting storage of financial documents.
- Paper documents: locked drawer/cabinet/room, index, system used (numerical, chronological, alphabetical, alphanumerical).
- Electronic documents: password protected, filing protocols, backups.

B   How working relationships contribute to an effective business

Knowing and understanding the principles and practices of effective teamwork in a business environment.

B1 Communication

Knowledge of the principles of effective communication and assessment of their impact, usage, importance and appropriateness in contributing to effective teamwork.

- Verbal communication skills:
  o language
  o tone of voice
  o appropriate responses
  o confidence.
- Written communication skills:
  o content
  o clarity
  o spelling and grammar
  o length
  o formality
  o accuracy
  o style.
- Non-verbal communication:
  o body language
  o posture
  o facial expressions
  o eye contact
  o active listening.
- Impact of poor communication:
  o misunderstandings
  o ill-feeling between staff
  o complaints
  o mistakes
  o missed deadlines.

B2 Teamwork

Understanding the requirements of effective teamwork and explaining how it impacts on themselves and their business.

- The skills and requirements of working as a team:
  o cooperation
  o learning from others
  o meeting agreed deadlines
  o achieving quality standards
  o positive attitude
  o willingness
  o showing support
  o accepting others' strengths and weaknesses
  o acknowledging own strengths and weaknesses
  o receiving and offering feedback
  o displaying courteous behaviour – returning calls, responding to emails, confirming attendance at meetings.

- The results of working as an effective team:
  - the provision of quality goods and service
  - good reputation for self
  - self-development
  - job satisfaction
  - reputation of organisation
  - maintained or increased business
  - financial security.

C   The legal framework in which your business operates

Knowledge, understanding and applying legal responsibilities in an administrative role in a business environment and be able to apply these in context.

C1 Use and storage of information

Knowledge, understanding and application of the principles of security of information.

- Principles of the data protection legislation:
  - information obtained and processed fairly and lawfully
  - obtained only for specific purposes
  - adequate, relevant and not excessive
  - accurate and up to date
  - held no longer than is necessary for the registered purpose
  - must be processed in accordance with the rights of the individual, and the individual has the right to see the information held on them
  - surrounded by proper security
  - cannot be transferred to countries outside the EU unless individual gives consent.

C2 Employers' and employees' responsibilities under health and safety legislation

Knowledge and understanding of the need for safe working in a business environment.

- The maintenance of a healthy and safe work environment.
- Ensuring safe working practices.
- Adhering to safe working practices.
- Having suitable procedures in place.
- Following set procedures.
- Identifying and assessing risks and hazards.
- Safe manual handling.
- Safe use of equipment.
- Provision and use of personal protective equipment (PPE).
- Control of Substances Hazardous to Health (COSHH) Regulations 2002.
- Provision of instruction, training and guidance.
- Adherence to guidelines and safe working practices.
- Accurate labelling of substances.
- Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013.

C3 Consumer rights

Knowledge and understanding of the key requirements of consumer legislation for administrators.

- Consumer Rights Act 2015: goods and digital content must be of satisfactory quality, fit for a particular purpose and match the description; consumer has the short-term right to reject, request repair, or replacement of faulty goods within 30 days of supply; the trader must provide repair or replacement at no cost to the consumer, within a reasonable time, without causing significant inconvenience; where repair or replacement fail, entitlement to further repairs, replacements, claim a price reduction or the right to reject; after six months, consumer has to prove defect/fault present at time of purchase; service must be carried out with reasonable care and skill; information said or written to the consumer is binding where the consumer relies on it; must be done for a reasonable price; must be carried out within a reasonable time.

- Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013: location of retailer and purchaser, delivery deadlines, cooling off period, rights to cancellation, confirmation of purchase; rights to a refund.

C4 Equality and employment

Knowledge and understanding of the employee's legal rights and responsibilities.

- Equality Act 2010: legally protects people from discrimination (age, disability, race, religion, sex, sexual orientation, being pregnant or having a child, being or becoming a transsexual person or being married or in a civil partnership) in the workplace and in wider society.

- Working Time Regulations 1998: maximum weekly working time limit, time off, rest break entitlement, paid annual leave entitlement.

- Employment Rights Act 1996: right to statements of employment particulars, right to itemised pay statement, protection of wages (no unauthorised deductions), right to time off for antenatal care, right to maternity and paternity leave, right not to be unfairly dismissed.

D The structure in which the organisation operates

Knowledge and understanding of the organisational structure in which businesses operate and how this affects relationships and communications within those businesses.

D1 Ownership

Knowledge and understanding of different types of business ownership.

- Private, sole trader, partnership, private limited company (Ltd), public limited company (plc), cooperative.
- Public: government department, public corporation.
- Not-for-profit: charitable trust, voluntary sector business.

D2 Size

Knowledge of the terms used for different sizes of organisations.

- Micro: up to 9 staff
- SMEs (small- to medium-sized enterprises): small – between 10 and 49 staff, medium – between 50 and 249 staff.
- Large: more than 250 staff.

D3 Structure

Knowledge, understanding and assessment of how the organisational structure of a business based on size, type and needs will affect the administrator's role.

- Flat.
- Tall.
- Hierarchical.
- Matrix.
- Functional.
- Structures used by small organisations:
  - flat hierarchical – few members of staff, individuals have more responsibility, able to be more responsive to market needs
  - functional – in-depth knowledge of all aspects of the business, know all employees, queries directed to single point of contact.
- Structures used by large organisations on one site:
  - tall hierarchical – more people, more focused area of responsibility, in-depth knowledge of one functional area, general knowledge of all other areas
  - matrix – general knowledge and understanding of all areas of the business, need to build relationships across the business, in-depth knowledge within the functional area, more than one point of contact across the business
  - functional – in-depth knowledge of all aspects of the business, know all employees, queries directed to single point of contact.
- Structures used by large organisations across sites:
  - tall hierarchical – more people, more focused area of responsibility, in-depth knowledge of one functional area, general knowledge of all other areas
  - matrix – general knowledge and understanding of all areas of the business, need to build relationships across the business, in-depth knowledge within the functional area, more than one point of contact across the business.

Grade descriptors

To achieve a grade learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

Level 2 Pass

Learners will be able to demonstrate knowledge that underpins the key tasks and role of an administrator in a business and apply it in context. They have a sound understanding of procedures, considerations, responsibilities and implications associated with the principles, and are able to apply this to familiar situations/contexts. They are able to recall, interpret and apply information about the importance of the role, responsibilities and procedures.

Level 2 Distinction

Learners will be able to demonstrate thorough knowledge and understanding of the key responsibilities of the role of an administrator in a business, applying this to a range of familiar and unfamiliar situations. Learners are able to assess the application of these principles and relate them to the role of a business assistant and the skills required to support the business.

Learners will be able to interpret information about the importance of the role, responsibilities and procedures, and make reasoned judgements in a range of different contexts, demonstrating understanding of the interrelationships between the role, responsibilities and procedures and the requirements for demonstrating the range of necessary skills.

Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners examine in detail the meaning or essential features of a topic or situation, or break something down methodically into its components to say how they are related and explain how each one contributes to the topic or situation.
Assess	Learners present a careful consideration of varied factors or events that apply to a specific situation, or identify those which are the most important or relevant to arrive at a conclusion.
Complete	Learners are required to add information based on a stimulus/resource. This could be to complete a table, graph, chart or missing word/phrase from a sentence/statement.
Discuss	Learners consider different aspects of a topic, how they interrelate and the extent to which they are important.
Evaluate	Learners draw on varied information to consider aspects such as strengths or weaknesses, advantages or disadvantages, alternative actions, and relevance or significance, and come to a conclusion.
Explain	Learners show they understand the origins, functions and objectives of a subject and its suitability for purpose. They give reasons to support an opinion, view or argument, with clear details.
Give	Learners provide examples, justifications and/or reasons to a context.
Identify	Learners indicate the main features or purpose of something, and/or are able to discern and understand facts or qualities.
Match	Learners choose a thing that resembles or corresponds to another, to make a similar or complementary pair.
Outline	Learners provide a general description showing the essential features of something but not the detail.
Name	Learners give a term by which the object of the question is identified.
State	Learners give a definition or example.

Links to other units

This unit links to:
- Unit 2: Providing Administrative Services
- Unit 3: Using Business Technology to Process and Communicate Information
- Unit 4: Planning, Organising and Supporting Business Events.

Employer involvement

Centres may involve employers in the delivery of this unit if there are local opportunities to do so. There is no specific guidance related to this unit.

Unit 2: Providing Administrative Services

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop and demonstrate their skills in providing administrative services by using office equipment safely and working productively with others to carry out routine administrative activities successfully.

It is strongly recommend that learners take part in work experience in an administrative environment in order to develop the skills for this unit and to generate supporting evidence for assessment.

Unit introduction

Behind every successful organisation is a team of administrative support staff. The administrator's function varies from organisation to organisation, depending on size. However, the ability to be a flexible and adaptable team member who embraces the variety and range of work activities associated with this role is essential for every organisation. Administrators usually work in a well-structured, organised team where agreed roles and responsibilities contribute to the achievement of business activities, and each team member works in an effective and efficient manner to meet individual, team and organisational targets.

In this unit, you will develop and demonstrate the skills required to carry out a range of routine administrative activities. These include managing information, handling mail, supporting meetings, and greeting and meeting visitors. As part of the support role, an administrator will need to use office equipment safely and in line with procedures, and work with others in a professional and respectful manner to ensure the completion of tasks to meet the agreed timescales.

The transferable and sector skills you develop in this unit will help prepare you for progression to employment as a business administrator. They will also help you to progress to business roles across other sectors, as well as to future roles as a supervisor or team leader.

Learning aims

In this unit you will:

A Carry out routine administrative activities to meet requirements

B Use office equipment safely and in line with procedures

C Demonstrate professional behaviours and effective communication in the work environment.

UNIT 2: PROVIDING ADMINISTRATIVE SERVICES

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Carry out routine administrative activities to meet requirements	**A1** Types of administrative activities **A2** Managing time and workload **A3** Completing administrative activities to meet requirements	Assessor observation records with other supporting evidence, to include witness testimony, photographic/video evidence and other relevant documentation associated with the activities carried out. A leaflet or presentation on managing time and tasks to meet requirements.
B Use office equipment safely and in line with procedures	**B1** Types of office equipment **B2** Using office equipment	
C Demonstrate professional behaviours and effective communication in the work environment	**C1** Professional behaviours **C2** Communicating effectively in different work situations	

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Handling mail • Managing diaries • Supporting meetings • Making and receiving telephone calls • Making travel and accommodation arrangements • Greeting and looking after visitors • Operating office equipment safely	• Workplace etiquette and office behaviours • How to manage time and workload • Professional business communications • Types of administrative activities • Types of office equipment • Health, safety and security considerations • How to take instructions for a task	• Communication • Working with others • Problem solving • Preparing for work

Unit content

Knowledge and sector skills

Learning aim A: Carry out routine administrative activities to meet requirements

A1 Types of administrative activities

Types of routine administrative activities:

- handling mail – distributing incoming mail and collecting and despatching outgoing mail

- managing diaries – making diary entries, prioritising, negotiating and agreeing changes and communicating diary entries to relevant people

- supporting meetings – organising and setting up venues, inviting and confirming attendees, circulating meeting papers and completing meeting follow-up activities

- reception services – greeting and looking after visitors, and making telephone calls internally and externally

- supporting the organisation of business travel and accommodation – use of itineraries, making travel and accommodation bookings and producing supporting travel documentation

- managing information – storing and retrieving information in electronic and paper-based information systems, data input, and printing, collating and distributing documents.

A2 Managing time and workload

- The importance of completing tasks on time and the implications of late completion.

- Techniques for managing workload, e.g. regular review of workload, prioritising, asking colleagues for help.

- Types of distractions and interruptions in the work environment (e.g. noisy colleagues, instant messages, smartphones) and how to minimise them to stay on task.

- Use of time management tools to complete tasks on time, e.g. using calendars, schedules, diary, 'things to do' list.

- Prioritising tasks according to situation, e.g. task urgency and importance, consequence of late completion.

A3 Completing administrative activities to meet requirements

- Know how to carry out the different administrative activities, e.g. applying generally accepted best practice and principles, following organisational work instructions and procedures, following given instructions.

- Considerations for compliance – health and safety, confidentiality, organisational policy, legislation, e.g. data protection legislation.

- Importance of having a clear task brief and the skills in taking the brief for a task, including listening and writing down details, asking relevant questions, seeking clarification, agreeing deadlines.

- Task preparation, including resources, equipment and materials, information.

- Meeting agreed standards in completing activities, e.g. agreed timescales, level of accuracy, quality standards.

- Checking quality of work and making necessary amendments.

Learning aim B: Use office equipment safely and in line with procedures

B1 Types of office equipment

- Categories of equipment:
  - personal (i.e. employee only)
  - shared (i.e. team)
  - specialised (i.e. trained individuals only).
- Types of office equipment, including telephone systems, computer systems, printer, photocopier/scanner, franking machine, laminator, document binder, shredder and guillotine.
- Features of different types of equipment.

B2 Using office equipment

- Factors affecting the choice of equipment, e.g. type of activity, suitability for purpose, efficient use of time, cost-effectiveness.
- Different types of resources for office equipment, e.g. printer ink or toner cartridges, removable storage media.
- Different types of problems that may occur with office equipment, e.g. photocopier out of paper or paper jams.
- Know how to minimise waste when using office equipment, e.g. printing test pages to check settings, double-sided photocopying, turning off equipment when not in use.
- Working safely with office equipment, including following manufacturers' instructions, following training and organisational procedures for use, complying with health and safety legislation and policy.
- Maintaining office equipment, including replenishing consumables, keeping equipment tidy and clean after use.
- Resolving problems and dealing with equipment failure when using office equipment.

Learning aim C: Demonstrate professional behaviours and effective communication in the work environment

C1 Professional behaviours

- Meeting organisational expectations – complying with code of conduct, health and safety, security, and procedures and policies, supporting others.
- Demonstrating positive personal behaviours:
  - being polite, reliable and trustworthy
  - showing respect for the values, beliefs and views of others
  - willingness to learn and take instructions and directions
  - adopting a positive approach to work.

C2 Communicating effectively in different work situations

- Different situations in the work environment, e.g. team meetings, one-to-one meetings, responding to internal and external queries.
- Types of written communication, e.g. emails, letters.
- Considerations for written communication, e.g. clarity of message, formality, use of organisational standard template, email etiquette, format, accuracy of content and corporate branding.
- Communicating in writing to meet the requirements of the situation using standard layouts and conventions for business communication.
- Types of verbal communication, e.g. face to face, telephone, teleconferencing, video conferencing.

- Using verbal communication skills appropriate to the situation, e.g. tone of voice, volume, formality of language, speed.
- Using verbal communication techniques as relevant and appropriate, e.g. active listening, questioning, reflecting and clarifying, summarising, mirroring.
- Demonstrating appropriate non-verbal communication behaviours, e.g. body language, posture, facial expressions.

Transferable skills

Communication
- Selecting and using different written, verbal and non-verbal communication skills and techniques appropriately in carrying out and completing administrative activities.

Working with others
- Taking responsibility for allocated tasks and working collaboratively with others in a respectful and considerate manner.

Problem solving
- Asking relevant questions to clarify the requirements for administrative tasks, managing time and workload to complete tasks and resolving any potential barriers to completing tasks.

Preparing for work
- Applying relevant knowledge and understanding in carrying out administrative activities and using office equipment.

UNIT 2: PROVIDING ADMINISTRATIVE SERVICES

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Carry out routine administrative activities to meet requirements		
A.P1 Follow instructions to carry out at least three routine administrative activities to meet requirements.	**A.M1** Carry out at least three routine administrative activities in line with requirements, demonstrating experience and procedural knowledge in their approach.	**A.D1** Carry out at least three routine administrative activities competently in line with requirements, demonstrating confidence and consistency in their approach.
A.P2 Outline how to manage time and task to ensure requirements are met on completion.	**A.M2** Describe different time management tools and task-taking techniques that are used to ensure tasks are completed in line with requirements.	**A.D2** Explain how to effectively manage time and tasks through the use of tools and techniques, including actions that can be taken to minimise interruptions and distractions.
Learning aim B: Use office equipment safely and in line with procedures		
B.P3 Use at least three different types of office equipment safely, following instructions and procedures.	**B.M3** Select and use at least three different types of office equipment safely, in line with instructions and procedures.	**B.D3** Select and use at least three different types of office equipment safely and competently, in line with organisational instructions and procedures, demonstrating the ability to resolve occurring problems.
Learning aim C: Demonstrate professional behaviours and effective communication in the work environment		
C.P4 Communicate effectively with others using acceptable and appropriate written, verbal and non-verbal communication skills and techniques.	**C.M4** Act in an exemplary manner in the work environment and demonstrate good written, verbal and non-verbal communication skills that are appropriate to the situations.	**C.D4** Act in an exemplary manner in the work environment and consistently demonstrate professional written, verbal and non-verbal communication skills that are appropriate to the situations.
C.P5 Demonstrate acceptable and appropriate behaviours in the work environment.		

Essential information for assessment decisions

Learning aims A, B and C

For distinction standard, learners will:

- carry out at least three different routine administrative activities competently to meet the requirements of the brief and agreed standards, demonstrating comprehensive knowledge of how to carry out the activities and a high level of confidence, consistency and experience in moving through the stages in the activities. Learners will work independently and resolve potential issues. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete

- select and use at least three different types of office equipment safely and competently, in line with instructions and procedures, demonstrating technical ability and mastery in using the range of functions. Learners will confidently select the appropriate office equipment for the tasks and will deal independently with occurring problems, such as paper jams in a photocopier. The office equipment should be limited to routine office equipment and should not include bespoke equipment

- explain how time management tools and task-taking techniques can be used to ensure that tasks are completed in line with requirements. Learners will explain at least two time management tools and at least three task-taking techniques, supported by detailed examples of at least three actions that can be taken to minimise distractions and disruptions in order to stay on task and schedule

- use written, verbal and non-verbal communication skills and techniques that meet professional standards in work situations, and that convey the intended message effectively. Learners will consistently apply a range of verbal communication techniques, such as questioning, active listening and clarifying, alongside non-verbal communication skills that are appropriate to the situations and messages. Written communications will be professionally presented, error free and will convey the message in a business-like manner that is in line with agreed standards

- meet expectations for workplace conduct and demonstrate professional behaviours and attitudes consistently. Learners will demonstrate respect and courtesy to others and will show a willingness to learn and reliability in completing tasks.

For merit standard, learners will:

- carry out at least three different routine administrative activities to meet the requirements of the brief and agreed standards. Learners will have good knowledge and experience of carrying out the activities and so will require little guidance or direction in moving through the stages of the activities. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete

- describe at least two basic time management tools and at least three techniques that may be used in taking a task brief

- select and use at least three different types of office equipment safely and in line with instructions and procedures, demonstrating technical ability and experience in using the range of functions. Learners will confidently select the appropriate office equipment for the task and will use the range of functions without prompting. The office equipment should be limited to routine office equipment, and should not include bespoke equipment

- use written, verbal and non-verbal communication skills and techniques that meet acceptable business standards, conveying the intended message effectively. Learners will apply verbal communication techniques effectively, such as active listening and questioning, alongside non-verbal communication skills that are appropriate to the situations and messages. Written communications may have minor flaws but will be well presented and will convey the message intended in a business-like manner, in line with acceptable business standards

- meet expectations for workplace conduct and demonstrate professional behaviours and attitudes consistently. Learners will demonstrate respect and courtesy to others and will show a willingness to learn and reliability in completing tasks.

For pass standard, learners will:

- carry out at least three different routine administrative activities to meet the requirements of the brief and agreed standards. Learners will demonstrate some skills in carrying out the activities but will lack fluency and experience and will likely need instructions and feedback to complete the activities. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete

- outline at least two time management tools and give a brief outline of using a task brief to ensure requirements are met

- use at least three different types of office equipment safely, following instructions and procedures. Learners will need direction on the right equipment for a task and while they will be able to use the basic functionality of equipment, they will lack the confidence to use the range of functions and will show hesitation. The office equipment should be limited to routine office equipment and should not include bespoke equipment

- use written, verbal and non-verbal communication skills and techniques that are acceptable and appropriate to the work situations, and that convey the intended message effectively. Learners will use communication techniques, such as active listening and questioning, adequately. Their verbal and non-verbal communications will demonstrate an appropriate level of formality, tone of voice and body language relevant to the situations and the messages being communicated. Written communications may have minor flaws such as punctuation and formatting but still convey the intended message clearly and are in line with acceptable business standards

- generally meet expectations for workplace conduct and demonstrate acceptable personal behaviours in the work environment. They will usually demonstrate respect and courtesy to others and will show positive attitudes to work.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

Suggested scenario

You have arrived at the office to find that your colleague has called in sick and will be off work for a month. Your manager has asked if you can pick up her work to ensure the team remains fully functional. You have shared access to your colleague's diary and can see exactly what she has planned to complete, which includes organising a virtual team meeting, printing and collating materials for a training session, and booking travel and accommodation for a business trip for the team manager. You will need to merge your administrative tasks with those of your colleague in order to plan your workload and priorities for the day.

You are required to:

- have a conversation with the team manager to confirm the requirements for travel and accommodation prior to booking
- carry out the tasks in your colleague's diary, meeting the necessary requirements
- use at least three different types of office equipment safely when carrying out the tasks
- send an email to the participants for the meeting, giving them the necessary details to join the virtual meeting
- prepare a leaflet for the new temporary team member on how to manage time and task, and minimise distractions and interruptions when carrying out administrative tasks.

Where learners have access to suitable work experience, most of the evidence for the assessment can be generated from the workplace. Opportunities for learners to engage in workplace activities are valuable for demonstrating professional skills and abilities in communication, carrying out administrative activities and using office equipment.

Observation of learners for assessment should be carried out by the tutor or assessor in one or more sessions when learners have the opportunity to demonstrate their skills across the required range of administrative activities. The workplace supervisor could contribute to assessment by providing witness statements. Learners should present relevant evidence such as written business communications, a record of activities undertaken, annotated plans.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

A different scenario should be used and learners should be asked to carry out different administrative activities and use different equipment, where possible.

UNIT 2: PROVIDING ADMINISTRATIVE SERVICES

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to this unit should outline the sector skills, transferable skills, knowledge and behaviours of the unit, and how achievement of the unit could lead to a career in an administrative role. Delivery of this unit must focus on giving learners appropriate learning opportunities that focus on each of the administrative activities specified in the unit content. Before assessment, learners are required to develop the necessary skills, knowledge and behaviours to undertake these activities with confidence.

The tutor should aim to introduce learners to a varied range of common administrative activities as outlined in the unit content. This unit builds on and complements the content in *Unit 1: Understanding Administrative Services*, so it is important that both units are delivered at the same time for learners to apply the knowledge developed in *Unit 1* to demonstrating the skills in this unit. This is important for relating principles and theory to practice.

Suggested time: about 2 hours.

Activity: Developing knowledge and skills to carry out routine administrative activities to meet requirements and timescales

Role-play activities would allow learners to develop the skills required to carry out each administrative activity. Realistic work exercises would give learners the opportunity to practise demonstrating skills and behaviours, as well as develop understanding of appropriate tools and techniques to apply to tasks. Learners could be given the opportunity to shadow centre-based staff who routinely undertake administrative activities, with a focus on how the use of appropriate tools and techniques lead to effective and efficient completion of administrative tasks.

Learners could visit local employers to carry out off-site, real-life administrative activities in local organisations. This could give learners the opportunity to observe naturally occurring skills and behaviours in a business environment and question staff to enhance their own knowledge and understanding of systems, processes and working practices.

The sections below provide detailed delivery guidance for each administrative activity.

Handling mail

Tutors lead a presentation on examples of different postal and courier services and how to select the most appropriate and cost-effective service for the mail item being despatched, using information from different mail service providers. Group activities relating to different mail items, including letters, parcels, valuable and fragile items, ensure learners understand how to package mail items securely, depending on type, and prepare the items appropriately for despatch within timescales specified by postal service providers. The use of video clips and news articles about the importance of following organisational procedures when handling suspicious mail and the implications of not following such procedures would raise awareness of the importance of taking care when receiving and processing incoming mail.

Managing diaries

Tutor-led presentations on the different types of diary systems used in organisations would provide a greater insight for learners and give them experience of both paper and electronic diary systems. Learners would benefit from demonstration of each diary system and specific requirements of each when making or updating diary entries, as well as understanding the purpose of a diary system and the importance of managing them effectively. Learners should be given the opportunity to practise demonstrating skills for managing diary systems through a variety of common workplace scenarios.

Supporting meetings

Tutor-led presentations on features and functions of different types of business meetings would develop learners' knowledge and understanding of support requirements for each meeting type. Learners would benefit from viewing examples of different meeting room layouts through images and video clips, developing understanding of the links between different meeting types and appropriate room layout. Tutor-led demonstrations on the tools and techniques available to invite attendees to meetings will provide learners with opportunities to further explore different invitation methods, including verbal, written and electronic means. Examples of meeting papers could be used in discussions to provide visual references to documents such as agendas, meeting minutes and other relevant materials learners may be required to circulate.

Reception services

There is the opportunity to combine delivery of learning and demonstration of practical skills with other administrative activities such as managing diaries, handling mail and maintaining and issuing stationery stock, as these are activities typically associated with the role and responsibilities of an administrator providing reception services. Learners should focus on the standards of customer service skills and how to deliver effective customer service using verbal communication skills. Video clips of customer service skills being demonstrated in the context of an administrative role would engage learners in the topic and expand understanding of how to meet the needs and expectations of visitors to the organisation. Learners could undertake role-play activities to practise skills associated with providing reception services.

Supporting the organisation of business travel and accommodation

Group discussions on different transport types and accommodation types would provide learners with knowledge of services they may be expected to book. Examples of travel and accommodation itineraries should be used to give learners an opportunity to understand the importance of being organised and preparing the travel and accommodation information and documentation for staff ahead of their departure from the office. Practical activities sourcing relevant travel and accommodation providers through internet sources would allow learners to familiarise themselves with online booking systems and the information required when making bookings. Practical activities where learners are given the opportunity to practise demonstrating skills using different travel and accommodation requests, which also include working within a budget and a given timescale, would provide context and greater understanding around budgets and limitations.

Managing information

This topic could be delivered in conjunction with *Unit 3: Using Business Technology to Process and Communicate Information*. Tutor-led presentations on the types of information different organisations may store or be required to retrieve would provide learners with opportunities to gain understanding of the breadth of this topic and apply this knowledge in the context of potential work experience opportunities. Learners need to understand considerations relating to data protection, information security and confidentiality and gain an understanding of how to apply this legislation to routine information management tasks.

Managing time and workload and completing activities to meet requirements

Examples of tools and techniques for planning, preparing and managing workloads and priorities should be given for learners to work in groups or individually to establish how such tools and techniques benefit the individuals, teams and organisations. Learners could be encouraged to use to-do lists and diaries when managing their time during their learning programme or at work experience placements to practise these skills. Discussions should focus on the importance of using appropriate tools and techniques to complete administrative tasks by the agreed timescales, regularly reviewing progress and minimising distractions in the working day in order to stay on task.

Tutor-led discussion could be used to introduce the requirements that need to be met in completing administrative activities, particularly around meeting the requirements of the task brief and meeting organisational and legal requirements. Examples of local organisations' policies, procedures and work instructions for administrative activities could be used to provide insight into the different requirements that they need to comply with. Individual and group research and presentation could be used to explore legal requirements such as data protection and health and safety. Role-play activities could be used to demonstrate skills in taking a task brief and working with changing requirements.

Suggested time: about 24 hours.

Activity: Developing knowledge and skills in using office equipment safely

Tutor-led presentation on the different types of office equipment would give learners an understanding of office equipment uses and workplace situations where office equipment is used. Group activities and discussions around the types of equipment that are considered as personal, shared and specialised would be a good introduction to this learning aim.

Telephone systems

Learners would benefit from knowing the difference between desktop telephone equipment and organisational switchboards and the contexts in which these would be used. Learners should be introduced to the features and functions of switchboards such as 'night service', teleconferencing and out-of-office modes. Verbal communication skills specific to telephony should be discussed with learners and opportunities provided to practise greeting callers, listening to callers, demonstrating positive non-verbal communication skills, summarising calls and taking accurate messages from callers to pass to colleagues.

Computer systems

Delivery of this topic could be combined with *Unit 3: Using Business Technology to Process and Communicate Information*, which focuses on the use of business technology and software.

Tutors lead a discussion on the types of computer hardware and software and how organisations use these systems to make business operations more efficient. Group discussions about the components that make up a computer system would familiarise learners with technological terminology. Tutor-led presentations relating to health, safety and security considerations will raise learners' awareness of organisational and legal requirements to protect people, equipment and information. Learners research the basic principles of relevant legislation, including health and safety at work, display screen equipment and data protection. Tutors give practical demonstrations on the use of computer systems and software, including tools and functions of applications software such as word processing, presentation, spreadsheet, data management and email. Learners should be given the opportunity to practise their skills using a range of computer systems and software for different purposes.

Other office equipment (printers, photocopiers, franking machines, shredders, binders)

Tutor-led presentations and demonstrations on the use of each piece of equipment would give learners an understanding of their features and functions and their use in an administrative environment. This will enable learners to make informed decisions about the appropriateness of a piece of equipment for a specific task. The use of video clips and news articles on health and safety considerations and risks in the workplace, particularly those linked to the appropriate use of office equipment, would contribute to learners' understanding of the importance of professional behaviours and safe working practices. Discussions on health and safety, maintaining equipment, sustainability and following organisational procedures and policies will be necessary to ensure learners' understanding.

Learners should get sufficient time to practise using the equipment and need to understand how to deal with instances of equipment failure or unexpected situations.

Suggested time: about 20 hours.

Activity: Understanding professional behaviours and effective communication skills

Tutors will need to provide clear links between employee behaviour and performance and the success of the organisation to stress the importance of this topic. Centres may consider inviting local employers to discuss employer expectations with the group to raise awareness of the importance of meeting these expectations. Learners should be encouraged to practise demonstrating skills relating to personal presentation, arriving in the workplace and being ready to start work at the agreed time and following safe and secure working practices.

Tutor or employer-led discussions on behaviours more recently associated with the modern age, such as having personal mobile phones on the desk and responding to messages, checking social media during work hours, and spending time away from the workstation to talk with colleagues about non-work related matters. Learners need to understand the negative impact these have on the individual, including being distracted and 'off task' and failing to meet given targets for performance, quality and timescales.

Tutor-led discussions and independent research into external factors that influence working practices and the importance of complying with these would provide knowledge and understanding for learners of legislation and regulations required of employers and employees. Application of organisational policies and procedures aligned to legislation such as health and safety at work, data protection and equality will provide context for learners.

Learners should explore the value of effective written, verbal and non-verbal communication skills and be given examples of strong and weak skills and the impact of them in different business situations. Tutors may use a range of learning mediums such as video to engage learners with this topic.

Learners could use role-play activities to practise communicating verbally and using appropriate non-verbal communication skills in a variety of common workplace scenarios. Realistic teamwork exercises should be used to give learners an opportunity to practise teamwork skills, including demonstration of effective skills and behaviours in line with organisational expectations. Suggested activities could include questioning techniques, active listening, being alert, paying attention during workplace discussions and using positive and open body language.

Scenario-based tasks could be set to give learners the opportunity to develop skills and use appropriate language, tone and meaning in written communications within a business team.

Learners should be encouraged to explore the role of an administrator using internet recruitment sources and reading job descriptions of similar roles to establish its role and responsibilities. Visits to local business organisations may give learners the opportunity to discuss roles and responsibilities, including behaviours, performance and standards expected by employers. Further group or individual activities around employment rights and responsibilities may also provide opportunities to develop knowledge of this topic.

There is an opportunity for tutors to use learning activities from *Unit 3: Using Business Technology to Process and Communicate Information* to cover the written communication aspect of this learning outcome.

Suggested time: about 12 hours.

Activity: Preparing for assessment

Learners should be introduced to the assessment activities for each learning aim before undertaking their assessments and their work experience. Learners should be allowed sufficient time on work experience to familiarise themselves with the organisation and nature of administrative services that support the organisation's business operations.

Before undertaking the summative assessment activity, learners could undertake practice assessments, receiving peer/tutor feedback.

Suggested time: about 4 hours.

Essential resources

For this unit, learners will need access to a range of standard office equipment and resources and a professional business environment that provides the opportunity for them to demonstrate the skills and abilities required for assessment.

Links to other units

This unit links to:
- Unit 1: Understanding Administrative Services
- Unit 3: Using Business Technology to Process and Communicate Information
- Unit 4: Planning, Organising and Supporting Business Events.

Employer involvement

This unit would benefit from employer involvement in the form of the provision of suitable work experience. Where this is not feasible or where it is insufficient for all assessment, then simulations may be used. Employers must be involved in assessment, for example through supporting the assessment process as expert witnesses or providing assessment materials.

The use of masterclasses in the following topics will benefit learners:
- the types of administrative services provided and how these benefit the organisation
- how to communicate effectively in the work environment
- working as a team member in an organisation.

Unit 3: Using Business Technology to Process and Communicate Information

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop and demonstrate specialist skills in using business technology to process information, producing a range of business documents and communicating and sharing information.

Unit introduction

Changing business technology has had a major impact on how administrative services are provided in the modern office. The availability of business technology such as portable computers, teleconferencing and video-conferencing systems, office suites and web-based technology has changed the way in which organisations conduct their business activities and therefore the nature of the work carried out by administrative staff. As a result, the ability to use a range of business technology is essential for all administrators.

In this unit, you will learn about a range of business technology and become familiar with their uses and functions. You will develop practical skills and learn how to select the most appropriate equipment, technology and software that will effectively meet the requirements of your tasks when handling business information and producing different business documents. You will use web-based technologies such as social media, shared drive workspaces and the internet to communicate and share information with colleagues, managers, clients and customers.

This unit will give you a range of skills in administration, allowing you to progress to an administrative role in a business or other related sector. You could progress to further study on an apprenticeship course or to other qualifications in business or other sectors.

Learning aims

In this unit you will:

A Process business information accurately using data management software

B Produce fit-for-purpose business documents using applications software

C Use web-based technology to communicate and share information.

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Process business information accurately using data management software	**A1** Types of business technology **A2** How business technology systems support organisations **A3** Using data management software to process information	Evidence in the form of document printouts and screenshots is expected to be the predominant source of evidence, e.g. business documents that have been produced, how information systems have been accessed, updated and saved, and updates to social media or web pages. Assessor observation records or witness testimonies may also be used to provide evidence.
B Produce fit-for-purpose business documents using applications software	**B1** Types of business documents and their uses **B2** Planning and producing business documents using applications software **B3** Checking fitness-for-purpose of business documents **B4** Storing business documents following organisational requirements	
C Use web-based technology to communicate and share information	**C1** Using different types of web-based technology **C2** Creating, communicating and sharing business information using web-based technology	

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Selecting and using data management software to access, enter, edit, manipulate, analyse, present and store business information • Selecting and using the appropriate applications software to create, structure, format, check and present business documents for a range of purposes • Using a range of web-based technology software and tools to communicate and share information in a range of situations	• Types of physical and online business technologies and how these support an organisation • Types of business documents • Organisational and legal requirements for handling and processing information • How to plan, produce and check fitness-for-purpose of business documents • Types of applications software and their functions • Methods for distributing business information	• Communication • Working with others • Problem solving • Managing information

Unit content

Knowledge and sector skills

Learning aim A: Process business information accurately using data management software

A1 Types of business technology

- Range of online business technology, e.g. social networking, video conferencing, shared workspaces.
- Different types of computing devices, e.g. desktops, tablets, laptops.
- Types of computer hardware, e.g. visual display units (VDUs), keyboards, printers, mouse, scanners.
- Types of computer software: systems software, applications software, e.g. word processing, spreadsheet, data management, presentation, desktop publishing.
- System applications – operating systems, local applications, web-based applications.

A2 How business technology systems support organisations

- Organisational uses of business technology, including document production, information storage, data processing, communicating with customers and staff.
- Benefits of using business technology, e.g. automated processing of information, speed of processing, secure storage of information.
- Different types of resources for business technology systems, e.g. computer accessories, consumables, stationery.
- Complying with regulatory requirements and standards, including information security procedures, data protection legislation.
- Safety considerations – health and safety at work, display screen equipment (DSE) regulations, computer misuse, electrical safety.

A3 Using data management software to process information

- How to access files, including level of authority, login procedures, username and passwords, identifying and opening files.
- Choice and use of input devices, e.g. keyboard, scanner, camera and voice recognition technology.
- Collecting information from different sources for data input, e.g. customers, colleagues.
- Using spreadsheet software:
  o capabilities, including entering numerical and non-numerical information, making calculations, creating graphs and charts, analysing and manipulating information, data validation
  o selecting and using a range of tools, e.g. cell alignment and formatting, number formatting, formulae, sorting and filtering, inserting and deleting rows and columns, freezing and hiding rows and columns, combining and linking data and worksheets.
- Using database software:
  o capabilities, including entering and editing data records, running database queries, producing database reports, holding vast quantities of data
  o selecting and using a range of tools, e.g. selecting and using data queries to filter required data, viewing queries and reports, creating new queries and reports, formatting tables and reports, designing forms, presenting data, changing field type and size, field parameters and formatting fields.

- How to check records for accuracy, completeness and validity, including sources of information, date.
- Responding appropriately to any problems in using software.
- Storing files – existing and new files, file saving conventions, closing records, storage locations.

Learning aim B: Produce fit-for-purpose business documents using applications software

B1 Types of business documents and their uses

- Different types of business documents, including letters, reports, meeting minutes, agendas, presentation slideshows, flyers, leaflets.
- Use of business documents – communicating with colleagues and customers, sharing information, recording meeting outcomes, presenting information.

B2 Planning and producing business documents using applications software

- Considerations for planning document production, including purpose, content, audience needs, deadline.
- Considerations when researching information, including copyright, intellectual property, validity of sources.
- Knowledge and application of standard layouts and conventions for different types of documents.
- Applying organisational standards and requirements, including corporate branding, house style, tone of voice, version control, document approval procedures.
- Using word-processing software:
  o considerations for design, layout and structure, e.g. use of templates and styles, page size and orientation, use of tables and images, combining information from other sources
  o selecting and using a range of tools, e.g. editing, formatting, reviewing and tracking changes, inserting images and tables, referencing, wrapping text, mail merge.
- Using presentation software:
  o considerations for design and layout, e.g. use of design templates, font size and colour, use of visuals and sound, slide transitions, animations
  o selecting and using a range of tools, e.g. editing, formatting, slideshow settings, organising and combining different forms of information, inserting charts, tables and images, embedding audio and video.

B3 Checking fitness-for-purpose of business documents

- Considerations for checking content, including accuracy in relation to original information, validity of information, copyright approvals, sign-off from appropriate person, data protection and confidentiality requirements.
- Knowledge and use of tools and techniques for checking format and layout, e.g. print preview, seeking feedback from others.
- Knowledge and use of tools and techniques for checking accuracy, e.g. proofreading, automated spelling and grammar check, peer review.

B4 Storing business documents following organisational requirements

- Complying with organisational requirements, including saving in the appropriate location, applying file saving conventions, complying with data security, using appropriate storage methods, allowing shared access.
- Methods of digital storage, e.g. shared network drives, cloud storage.
- Methods of physical storage, e.g. filing cabinets, information resource facilities.

Learning aim C: Use web-based technology to communicate and share information

C1 Using different types of web-based technology

- Intranet:
  - o uses, e.g. sharing information such as organisational policies and procedures, staff directory, accessing bespoke software, communicating and collaborating with colleagues
  - o selecting and using appropriate tools to complete a range of tasks, e.g. accessing and updating information, sending instant messages, uploading documents and videos, archiving outdated information.

- Email software:
  - o uses – communicating internally and externally, sending documents
  - o selecting and using appropriate tools to complete a range of tasks, e.g. creating and sending new emails, replying to emails (single and multiple recipients), attaching files, formatting messages, inserting hyperlinks, images and tables, delivery receipts.

- Different forms of online collaboration software, including video conferencing, e.g. Skype®, WebEx™; shared drive workspace, e.g. SharePoint®, Dropbox™, Google Docs™, cloud services; instant messaging, e.g. Google Hangout™:
  - o uses – sharing, editing and commenting on files, communicating in real time, virtual meeting with people in different geographical locations
  - o selecting and using appropriate tools to complete a range of tasks, e.g. setting up video-conferencing meetings and communicating joining instructions, uploading documents to shared work spaces.

- Social media, e.g. Facebook®, Twitter®, LinkedIn®:
  - o uses, e.g. promoting new products, services and offers, communicating with existing and potential customers, customer reviews
  - o selecting and using appropriate tools to complete a range of tasks, e.g. responding to customer queries, publishing promotion or event information.

- Benefits of using web-based technology, e.g. organisational effectiveness and efficiency, secure and consistent access to information, improved communications, reduced business costs.

C2 Creating, communicating and sharing business information using web-based technology

- Considerations in planning web-based communications, including audience needs, communication medium, timeliness, confidentiality, accuracy and validity of information, compliance with policy and procedures, e.g. social media policy.

- Use of acceptable language and tone.

- Different types of audiences, including colleagues, managers, customers, general public.

- Considerations for sharing information, including using appropriate file naming conventions, storage locations, sharing permissions.

- Impact and consequences for the organisation: risk to organisation's reputation, losing custom, negative publicity going viral, criminal or legal action being taken.

Transferable skills

Communication

- Producing fit-for-purpose business documents and communicating verbally, and in writing, with colleagues and customers using a range of business technology.

Working with others

- Taking responsibility for allocated tasks and working collaboratively with others in order to meet shared work targets.

Problem solving

- Resolving equipment and software issues, overcoming barriers in the workplace.

Managing information

- Sourcing information from valid and reliable sources; keeping information secure; entering, updating, organising and presenting business information.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Process business information accurately using data management software		
A.P1 Use computer equipment in line with health, safety and security procedures. **A.P2** Enter, edit, format and store information accurately using data management software appropriate to the requirements of tasks.	**A.M1** Use basic software interrogation tools to correctly extract and collate information to meet task requirements.	**A.D1** Demonstrate navigation and use of more advanced interrogation tools to analyse, manipulate and present accurate business information to meet task requirements.
Learning aim B: Produce fit-for-purpose business documents using applications software		
B.P3 Select and use the appropriate applications software to meet the requirements of the task. **B.P4** Use basic software tools to edit and format business documents that meet given requirements and acceptable business standards.	**B.M2** Use a range of software tools and techniques to format, structure and finish business documents that meet given requirements and acceptable business standards.	**B.D2** Use more advanced software tools and techniques to design, structure and finish business documents that meet given requirements and acceptable business standards.
Learning aim C: Use web-based technology to communicate and share information		
C.P5 Follow guidance in using web-based technology tools to communicate information in line with given requirements and business standards. **C.P6** Follow guidance in using web-based technology tools to share information in line with given requirements and business standards.	**C.M3** Select and use the appropriate web-based technology competently to communicate and share information in line with given requirements and business standards.	**C.D3** Critically review own practices in using web-based technology to communicate and share business information, identifying opportunities for future improvements.

Essential information for assessment decisions

Learning aims A, B and C

For distinction standard, learners will:

- demonstrate consistent technical ability to enter, edit and organise information using data management software. They will demonstrate effective use of complex database queries and spreadsheet formulae to extract, analyse and manipulate specific business information for different data reporting needs

- apply more advanced software tools and techniques in using standard or bespoke business software to design and produce at least two business documents to meet given requirements. Tools and techniques include setting up document templates for leaflets and business reports, table of contents, hyperlinking of pages, inserting header/footer and mail merge

- produce written communications to acceptable business standards of accuracy of content, spelling and grammar, using appropriate language and level of formality that conveys the message in a business-like manner

- comply with procedures relating to information security and confidentiality, as well as relevant policies, for appropriate use of technology and acceptable behaviours when using web-based technology

- produce an objective critical review of their work practices related to using web-based technology to carry out administrative tasks. The review must:
  - o include a brief description of the tasks undertaken
  - o explain how they have selected and used system and software tools, techniques and functions to carry out the tasks in compliance with health, safety and security, and organisational procedures and legal requirements
  - o explain how they ensured that their work met quality standards and has not created any risks to the organisation's reputation and customer base
  - o be fully substantiated by suitable evidence. Learners must detail at least three specific ways in which they have learned from the experience and explain how they will apply these to improve their performance in the future.

For merit standard, learners will:

- show confidence in the use of data management software, including creating new records in a database and using basic data interrogation tools, including database queries and spreadsheet formulae to extract and collate specific information to meet requirements

- use a range of software tools and techniques effectively to format and structure documents to meet given requirements, including inserting tables and bullets, indenting paragraphs, combining information from other sources and of different types, and applying page numbers to multiple page documents. Learners must produce at least two documents

- select and use the appropriate software tools to carry out the allocated tasks. Learners will demonstrate technical ability and a high level of certainty and consistency. They will navigate software competently to complete the tasks and check information complies with relevant organisational and legal requirements. In general, learners will comply with the requirements for sharing information, such as sharing with the right permissions, using the agreed file naming conventions and directory set-up. Learners must complete at least two tasks that should be in the context of communicating using emails, instant messages and social media, updating and sharing information using shared work spaces and setting up online telephone or video conferencing applications in preparation for a meeting

- produce written communications to acceptable business standards of accuracy of content, spelling and grammar, using appropriate language and level of formality that conveys the message in a business-like manner
- comply with procedures relating to information security and confidentiality, as well as relevant policies for appropriate use of technology and acceptable behaviours when using web-based technology.

For pass standard, learners will:

- demonstrate safe and secure working practices at the workstation that minimise the risk of injury and loss of information, using the appropriate software to handle data. Learners will use simple software tools to sort or filter required information and use simple formulae to make calculations, including sum, average and percentage
- select the most appropriate software for tasks and use basic editing and formatting tools to produce at least two business documents in the right layout and that meet standard business formats, e.g. standard letter format. Documents should have basic paragraphing, appropriate line spacing, headings and the use of a professional font style and size
- use the appropriate software tools to carry out the allocated tasks but will need direction and support in selecting and using the technology. In general, learners will comply with the requirements for sharing information, such as sharing with the right permissions, using the agreed file naming conventions and directory set-up. Learners must complete at least two tasks; the tasks should be in the context of communicating using emails, instant messages and social media, updating and sharing information using shared work spaces and setting up online telephone or video conferencing applications in preparation for a meeting
- produce written communications to acceptable business standards of accuracy of content, spelling and grammar, using appropriate language and level of formality that conveys the message in a business-like manner
- comply with procedures relating to information security and confidentiality, as well as relevant policies for appropriate use of technology and acceptable behaviours when using web-based technology.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

For this this unit, tutors will need to provide suitable and sufficient information and data for learners to use in the assessment as appropriate to the scenarios used.

Suggested scenario

Your organisation is intending to run a series of workshops on improving health and safety in the work environment. You have been asked to help prepare the resources for the workshops. The intention is to provide information about good practice and health and safety in using business technology, including procedures for accessing IT and confidentiality of information.

As part of your role in making the preparations, you are required to:

- produce a leaflet providing information on safe and secure working practices when using web-based technology. You will source this information from the health and safety page of the organisation's intranet. The leaflet should be A4 and should include good design features such as colours, headlines and images; images may come from stock images found on the internet or from photographs

- use the appropriate software to produce a graphical representation of the data provided by your line manager on the health and safety practices of colleagues in the department

- produce a draft presentation that is to be shown at the workshops. It should include information on good health and safety practices and identify areas where the organisation needs to improve, using the graphs as supporting information. The presentation should be engaging and formatted to run as an interactive slideshow

- upload the presentation to the shared workspace for comment and feedback from your team manager.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

A different scenario should be used and learners should be asked to use different software and prepare different business documents from those in the first assessment.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to this unit should outline the sector skills, transferable skills, knowledge and behaviours of the unit and how achievement of the unit could lead to a career in an administrative role. Delivery of this unit must focus on giving learners appropriate learning opportunities that focus on each of the business technology and applications software specified in the unit content. Before assessment, learners are required to develop the necessary skills, knowledge and behaviours to undertake these activities with confidence.

Sufficient time needs to be allocated to learning and development activities required for each of the business technology and applications software to ensure learners receive the depth of knowledge and the opportunity to develop the practical skills that are associated with the use of these systems.

Realistic work exercises allow learners to practise demonstrating skills and behaviours across each area of technology, as well as develop understanding of appropriate tools and techniques to apply to tasks. Learners could be given the opportunity to shadow centre-based staff who routinely use business technology to complete administrative tasks.

The unit introduction should include learning and development of skills using computer hardware and components, as these items of equipment are generic across all learning aims.

Computer systems

Delivery of this topic could be combined with *Unit 2: Providing Administrative Services*, which focuses on the use of computer systems to complete administrative tasks. Tutors lead discussions about the types of computers, features and benefits of using desktop and laptop computers, and how organisations use these systems to make business operations more efficient. Group discussions about the components that make up a computer system would familiarise learners with technological terminology. Tutor-led presentations relating to health, safety and security considerations will raise learners' awareness of organisational and legal requirements to protect people, equipment and information. Learners research the basic principles of relevant legislation, including health and safety at work, display screen equipment and data protection. Tutors give practical demonstrations on the use of computer systems, including setting up a computer system, starting up a computer system, login procedures, standard features, including the desktop interface, finding files, folders and applications, opening applications software, lock-screen function, changing personal settings and closing down a computer system.

Input devices

Tutors lead presentations on the types of input devices, including mouse, keyboard, digital recorder and scanner, and how these are used in conjunction with computer systems. This will give learners insight into the tasks that require the use of devices to input information into a computer system, which they are likely to be required to complete. Tutors lead discussions about the features and functions of each input device and how they are used to input text, numbers and images and audio files, navigate computer systems and provide shortcuts and efficiencies when using computer systems. Learners would benefit from demonstration of each input device and functions, including right-clicking a mouse, using a tracker ball and scrolling wheel, standard keyboard shortcuts to copy, paste, save and print, and scanning single and multiple page documents. Learners should be given the opportunity to practise demonstrating skills in using input devices effectively and efficiently to complete a range of business tasks.

Output devices

Tutors lead a presentation about the types of output devices, including monitor, printer, projector and speakers, and how they are used in conjunction with computer systems. This will give learners insight into tasks that require the use of devices to output information from a computer system, which they are likely to be required to complete. Tutors lead a discussion about the features and functions of each output device and how they are used to output documents, sound and image. Learners would benefit from demonstration of each output device and its functions, including printer settings and capabilities, attaching a projector to project the computer screen onto a large screen, changing monitor settings, angle and height, and the use of speakers in an office environment. Learners should be given the opportunity to practise demonstrating skills in using output devices effectively and efficiently to complete a range of business tasks.

Suggested time: about 15 hours.

Activity: Developing knowledge and skills in using data management software to process business information

Sufficient time needs to be allocated to learning and development activities required for each of the software types used to manage data in an organisation. This will ensure learners receive in-depth knowledge and the opportunity to develop the practical skills that are associated with the functions and tools for each software type.

Tutor-led presentations on the various uses for spreadsheet and database software in an organisation will provide good insight for learners as they are likely to be required to complete tasks that require use of them. Tutor-led discussions of software capabilities, tools and techniques for entering, processing and managing accurate business information will provide underpinning knowledge and understanding. Groups discuss design considerations, including agreeing requirements, content and audience for the information and how the information is to be presented, distributed and stored, stressing the importance of good planning and preparing ahead of undertaking data management tasks. Learners would benefit from demonstration and the opportunity to practise and develop their skills in the use of the software tools and techniques detailed in the unit content.

Learners could visit local employers to carry out off-site, real-life activities in local organisations. This could give learners the opportunity to observe naturally occurring skills and behaviours in a business environment and question staff to enhance their own knowledge and understanding of systems and processes and working practices.

Suggested time: about 12 hours.

Activity: Developing knowledge and skills in producing a range of business documents using applications software

Tutors lead a presentation about the various uses for word processing and presentation software in an organisation and their capabilities, tools and techniques for creating well-structured, formatted and professionally presented business documents. Group discussions about the different type of documents, standard layout and conventions, and their design considerations such as purpose, content and audience will stress the importance of good planning and preparation ahead of document production. Emphasis should be placed on the appropriate use of presentations to avoid 'death by PowerPoint®', including the consideration of additional resources and activities to engage the audience. Learners should explore and discuss the importance of checking documents for fitness-for-purpose and the different ways of doing so to emphasise the need to produce professional documents that meet the requirements. Learners should be given an opportunity to practise structuring and formatting documents in a professional manner, including the use of corporate branding, margins, paragraphing, tables, inserting images and using automated tools for checking accuracy.

Learners would benefit from demonstration and the opportunity to practise and develop their skills in the use of the software tools and techniques as detailed in the unit content.

Suggested time: about 15 hours.

Activity: Developing knowledge and skills in communicating and sharing business information using web-based technology

While many learners may have experience in using social networking software for personal purposes, they may not have had previous experience or knowledge of how web-based systems and applications can be used for the purpose of undertaking business activities. Tutors should therefore ensure that the delivery emphasises that there are different requirements and practices when using the technology for business purposes. However, tutors should still encourage learners to share existing knowledge and experiences to engage them in the delivery of the topic.

Discussions and demonstrations should focus on:

- the different types of web-based technology, their uses and functions in an administrative environment
- the importance of internet safety and security to raise awareness of risks associated with internet and social media use, and how inappropriate use could damage the reputation of the organisation
- social media features and functions such as updating privacy settings, viewing and editing posts, removing inappropriate posts, publishing status updates, creating an event, responding to posts and private messages, sharing and downloading information
- the different types of business conferencing technology and their functionalities, such as Skype and WebEx and their uses in organisations and the administrative function
- the use of shared workspaces such as SharePoint and Google Docs in organisations and the importance of following file naming conventions, file saving locations, version control of documents and maintaining collaborative work on shared documents
- use of email software and the tools and capabilities for composing well-structured, formatted and professionally presented email messages. Learners would benefit from demonstration of software tools and techniques, including setting up and managing inbox folders, identifying unread and important emails, flagging emails, archiving emails, attaching files, inserting hyperlinks, sending messages to individuals and groups and setting up distribution lists.

Learners will have demonstrated skills in producing written business communications in previous units, however learners should be encouraged to consider the language, tone and pitch, and audience of the communications in the context of communicating and sharing information through web-based systems and technology.

Suggested time: about 18 hours.

Essential resources

For this unit, learners will need to have access to the necessary business systems, hardware and software, and online business technologies as detailed in the unit content.

Learners will also need access to suitable and sufficient information and data that is appropriate to the scenarios being used in order to undertake the assessment for this unit.

Links to other units

This unit has strong links to:
- Unit 1: Understanding Administrative Services
- Unit 2: Providing Administrative Services
- Unit 4: Planning, Organising and Supporting a Business Event.

Employer involvement

Employer involvement may be used to enhance the delivery of more specialist teaching areas, for example employers could be involved in delivering a masterclass on the use of current and emerging web-based software and tools in daily business operations, focusing on how these technologies help to improve operational efficiency and the potential risks to organisational reputation and commercial interest if used inappropriately.

Unit 4: Planning, Organising and Supporting Business Events

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal Synoptic**

Guided learning hours: **60**

Unit in brief

Learners develop and demonstrate skills in planning, organising and supporting business events.

Unit introduction

Most organisations hold a variety of business events, ranging from a team meeting with three or four staff, to a conference or exhibition with perhaps a couple of hundred people attending. Administrators play a key role in the success of these events. This unit explores the types of events held frequently by organisations and the role of the administrator in providing effective and efficient support before and during events.

In this unit, you will work with others to plan, organise and support a business event. You are expected to experience all the roles involved in organising and supporting a business event, you will develop key knowledge and skills such as producing an event plan, sourcing venues and taking minutes. You will work with others in setting up the venue, ensuring health and safety requirements are met, and arranging travel and accommodation as necessary. You will select and use knowledge and skills learned in the other units to produce, print and collate the relevant documentation and distribute them to participants, making use of the appropriate business technology and office equipment. You will support participants during the event using appropriate verbal and non-verbal communications skills and ensure that queries and complaints are resolved.

Although you will be working with others, you will demonstrate skills in planning, organising and supporting business costs individually.

The transferable and sector skills you develop will help prepare you to progress to employment as a business administrator. The skills acquired in this unit will also allow progression to business roles across other sectors, as well as the potential to lead to future roles as a supervisor or team leader.

Learning aims

In this unit you will:

A Plan and prepare for a business event according to a given brief

B Provide administrative support to a business event in accordance with business needs

C Carry out follow-up activities after a business event.

Unit summary

	Learning aim	Key teaching areas	Summary of suggested assessment evidence
A	Plan and prepare for a business event according to a given brief	**A1** Agreeing an event brief **A2** Planning for an event **A3** Making preparations for the event in line with agreed brief **A4** Processing and communicating information required before and during the event	Assessor observation records with other supporting evidence, to include witness testimony, photographic/video evidence and product evidence produced by the learner individually, such as event plan, details of the event and budgetary requirements, action plans/checklists, venue searches with costings, event materials, minutes/event notes and feedback forms. A written evaluation of the effectiveness of learners' planning, preparation and support activities for the event.
B	Provide administrative support to a business event in accordance with business needs	**B1** Welcoming and registering event participants **B2** Responding to queries, issues, problems and complaints **B3** Taking and distributing minutes	
C	Carry out follow-up activities after a business event	**C1** Follow-up activities to an event	

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Creating an event plan • Sourcing venues, equipment, accommodation and travel • Preparing information and materials for participants • Setting up venue to meet event requirements • Taking and producing minutes of a meeting • Resolving issues and complaints during an event	• How to plan different types of events • Preparations for an event • Information to be communicated before, during and after an event • Types of problems that can occur when providing business support for events • Types of minutes	• Communication • Working with others • Thinking skills/adaptability • Problem solving • Managing information • Preparing for work

Unit content

Knowledge and sector skills

Learning aim A: Plan and prepare for a business event according to a given brief

A1 Agreeing an event brief

- Definition of events include meetings and other business events.
- Types of meetings, including online and physical:
  - formal, e.g. divisional meetings, board meetings
  - informal, e.g. team meetings.
- Types of events, including online and physical:
  - internal events such as training events, divisional days, fundraising events
  - external events, e.g. product launches, trade shows.
- What to include in the event brief, including purpose, budget, date, time, location, target audience, message and evaluation criteria.
- Importance of agreeing a brief for an event.

A2 Planning for an event

- Role and responsibilities of individuals involved in the planning and organising of an event, e.g. event leader, event organiser, support staff.
- Contents of an event plan, including objectives, required activities, person(s) responsible, resources, deadline, potential risks and problems, and contingency planning.
- Format of an event plan.
- Importance of agreeing a plan.
- Considerations in planning an event, including participants' needs and special requirements, health, safety and security requirements, legal and organisational requirements for contracts, resources and materials.

A3 Making preparations for the event in line with agreed brief

- How to source a venue:
  - different types of venue, including venues for virtual events such as green screen studios
  - considerations in selecting a venue, including facilities and accessibility, suitability for purpose, technological capabilities, budget.
- Booking the venue, including using appropriate systems and procedures.
- Organising appropriate equipment and resources, e.g. event materials, projector and screen.
- Arranging for visiting speakers or presenters, as appropriate.
- Arranging travel, including modes of transport and accommodation if necessary.
- Setting up venue, e.g. room layout, audio-visual equipment, break out rooms, refreshments.
- Checking that necessary health and safety and any legal, local and contractual requirements have been met.
- Taking actions to mitigate against potential problems during the event.

A4 Processing and communicating information required before and during the event

- Methods of publicising the event, e.g. social media networks, calendar invite, email.
- Carrying out relevant administrative activities, e.g. producing documents, photocopying, collating, responding to email queries.
- Selecting and using appropriate business technology in processing and sharing information and producing documents.
- Preparing and distributing participant packs.
- Achieving maximum attendance, e.g. sending invitations in good time with full details, follow up acceptances and non-acceptances.

Learning aim B: Provide administrative support to a business event in accordance with business needs

B1 Welcoming and registering event participants

- Applying organisational protocols in greeting event participants on arrival.
- Recording attendance of participants and issuing name badges.
- Providing meeting-related information, e.g. direction to facilities, event resources.
- Meeting particular needs of participants, e.g. access arrangements, audio links or documents in braille.
- Demonstrating appropriate personal behaviour and presentation in line with organisational standards – professionalism, politeness, courtesy, good customer service.
- Communicating effectively with participants and support staff – verbal and non-verbal communication, use of plain English, business approach.
- Monitoring compliance with health and safety requirements, e.g. emergency evacuation procedures, hazards.
- Managing security, e.g. issuing participant cards, signing participants in and out, keeping confidential documents secure.
- Providing refreshments to meet the needs of participants, considering special dietary requirements.

B2 Responding to queries, issues, problems and complaints

- Types of queries, e.g. location of facilities, local transport.
- Potential problems, e.g. safety or security incident, equipment failure, unexpected high number of participants.
- Potential complaints, e.g. unprofessional behaviour, standard of facilities.
- Responding to queries appropriately, including using active listening techniques, offering apologies, prompt resolution, escalation of complaints and demonstrating professional behaviours.

B3 Taking and distributing minutes

- Different types of minutes – resolution, narrative and action.
- Content of minutes.
- Applying good practice in taking minutes, e.g. active listening, seeking clarification by paraphrasing, noting chair's summary of each item.
- Producing minutes – format of minutes, structure of minutes, legal requirements, use of professional language, tone and grammar, checking accuracy.
- Seeking approval of minutes, e.g. from chair of meeting, line manager.
- Responding to requests for changes and circulating minutes.
- Storing and distributing meeting minutes.

Learning aim C: Carry out follow-up activities after a business event

C1 Follow-up activities to an event

- Carrying out post-event actions, e.g. clearing up venue, making payments for any services used, circulating post-event information and documents.
- The importance of evaluating the performance of external services.
- Collecting feedback from event participants.
- Analysing participant feedback and sharing the results.
- Evaluating the effectiveness of meeting planning and arrangements.
- Identifying learning points and future improvements.

Transferable skills

Communication

- Confirming event objectives, querying roles and responsibilities, communicating information to participants.

Working with others

- Taking responsibility for event planning and activities, working collaboratively with others in a respectful and considerate manner.

Thinking skills/adaptability

- Identifying potential issues and problems in event planning and preparation, finding alternative ways of working, demonstrating a positive attitude and adaptability in dealing with changing situations.

Problem solving

- Planning for contingencies, taking actions to mitigate issues and problems and dealing with participants' queries and problems or equipment issues.

Managing information

- Sourcing information for event venues from valid and reliable sources, calculating and comparing costs of venues, organising and presenting event materials and information in the most suitable format using business technology.

Preparing for work

- Applying relevant knowledge and understanding in planning, organising and supporting a business event, conducting a critical review of the success of the event and the effectiveness of the planning and preparation.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Plan and prepare for a business event according to a given brief		
A.P1 Produce a basic plan for a business event that meets the requirements of the given brief.	**A.M1** Produce a detailed plan for a business event and make comprehensive preparations that aligns with the plan and brief and includes actions taken to mitigate potential problems.	**AB.D1** Evaluate the effectiveness of the planning, preparations and support activities for the event.
A.P2 Make satisfactory preparations for a business event that aligns with the event plan and the given brief.		
Learning aim B: Provide administrative support to a business event in accordance with business needs		
B.P3 Provide adequate support during a business event, handling tasks and queries satisfactorily and demonstrating professional and helpful behaviours.	**B.M2** Provide dedicated support during a business event, demonstrating technical ability and professionalism in handling tasks and resolving queries and issues.	
Learning aim C: Carry out follow-up activities after a business event		
C.P4 Carry out post-event follow-up activities in line with the event plan and brief, including gathering feedback from participants.	**C.M3** Evaluate the feedback from participants, using the appropriate business technology to analyse and present the results in an appropriate format.	**C.D2** Make justified recommendations for improving future events.

Essential information for assessment decisions

Learning aims A, B and C

Evidence to support the criteria must be produced by each learner individually. A detailed observation statement will be provided for each individual learner supported by individual learner evidence. Learners will be expected to agree the roles required to plan the event and then rotate through the roles and be able to provide individual evidence for each role.

For distinction standard, learners will:

- produce a written review assessing how their planning and preparation activities have impacted on their ability to provide support on the day of the event. The review must detail the activities undertaken in planning and preparation, and an explanation, with supporting examples of how these affected the support they were able to provide on the day of the event. There will be evidence of individual contribution and collaborative work within the team that results in the final event.

- make at least two recommendations for improving future events based on the results of participant feedback.

For merit standard, learners will:

- work with others to plan for an internal meeting or event. They will have a detailed plan that covers the key planning areas and includes contingency planning. They will carry out comprehensive preparations for the event with limited guidance. They will research and book a venue that is suitable for the event activities and that is in line with any budgetary requirements, and will carry out the necessary preparation activities in a timely manner, checking to ensure that requirements have been met. They will likely take some preventive actions to mitigate against problems on the day, e.g. checking that equipment is working before use at the event or printing extra copies of materials to take to the event. It will be clear from the evidence how the individual performed within their team and what their contribution to the final outcome was.

- demonstrate technical ability and professional behaviours in carrying out the necessary activities on the day, such as applying best practice in taking accurate minutes/notes, welcoming and greeting participants in a professional manner, and using equipment correctly and with confidence. They will deal with queries effectively, demonstrating detailed knowledge of the event and will likely resolve issues and problems quickly and independently

- use appropriate applications software such as a spreadsheet to analyse feedback from participants and present the results in a document such as a report or a presentation. The document will make use of tables and graphs as appropriate and will be presented to an acceptable standard in terms of layout, language and accuracy.

For pass standard, learners will:

- work with others to plan for an internal meeting or event. They will have a basic plan that covers areas such as a description of the event, resources, activities, date and time, and audience. With some guidance, they will make adequate preparations that will enable the event to function to an acceptable standard. However, their preparations will be limited in some areas, e.g. some activities may not be done in a timely manner or some preparation activities may not be fully attended to. They will show their individual contributions through their own evidence as well as their work within the team.

- handle the straightforward activities such as the welcoming and registering of participants reasonably well and will handle straightforward queries. They will be professional and helpful in working with others and communicating with participants. However, they will likely not be able to resolve problems independently, e.g. equipment issues, and where they are required to take meeting notes or minutes they will need help from others to capture the notes accurately

- carry out activities appropriate to their event such as clearing up the room, paying suppliers, if relevant, and circulating post-event information. If minutes or meeting notes are produced, these will be of an acceptable business standard in terms of layout, language and accuracy. Learners will gather feedback from participants using a simple data collection tool such as a feedback checklist to collect feedback on the running of the event.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from unit as well as the other units in the qualification, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

Learners need to carry out the assessment for this unit in a realistic environment where they have the opportunity to carry out the activities to plan, prepare and organise a real event, for example, a meeting, training session, a class/group event or similar in their learning environment. They are expected to work in teams with a maximum of 4 members. They should ensure that they work in each of the roles that are identified in the initial stages and provide evidence for each role. They are not expected to fulfil all the roles for the entire duration of the assessment.

Learners must be given a clear brief for the specific event and are required to:

* create an event plan based on the given brief
* source an appropriate venue
* make the necessary preparations for the event, including necessary equipment and resources
* provide support during the event, including taking notes/minutes of the information presented and agreed action points
* carry out the necessary post-event activities, including gathering feedback from participants.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

Learners will need to carry out the necessary activities for a different event.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to the unit should include the purpose of the synoptic unit and how it gives learners the opportunity to use the knowledge, understanding, skills and behaviours developed in other units to develop confidence and competence in providing administrative support in a coherent and holistic way.

An introduction to this unit should outline the sector skills, transferable skills, knowledge and behaviours of the unit, and how achievement of the unit could lead to a career in an administrative role. Delivery of this unit must focus on giving learners appropriate learning opportunities that focus on each event area, including planning, preparation, support and follow-up of event activities as specified in the unit content. Before assessment, learners are required to develop the necessary skills, knowledge and behaviours to undertake these activities with confidence.

Events and meetings

Tutors lead a presentation relating to different types of events, including meetings, used by organisations. Group discussions should cover different types of internal and external events. Tutor-led discussions about the types of activities associated with events will broaden knowledge of events and give learners opportunities to distinguish between different types of events.

Suggested time: about 4 hours.

Activity: Agreeing the business event brief, planning and making necessary preparations for an event

Planning an event

Tutor-led presentations relating to the process required when planning a business event will provide a greater insight for learners. Areas to be discussed include confirming the event brief, discussing and agreeing roles and responsibilities with colleagues, and creating a plan. The contents of an event plan should be discussed and emphasis placed on understanding the need to include each piece of information. Tutor-led discussions on the importance of predicating issues and problems and having a contingency plan would broaden the forward thinking skills of learners to anticipate problems in advance. Examples of event plans that contain various levels of detail could be shared with learners to identify key information requirements of an event plan and familiarise them with layout and structure of the plan, as well as the content.

Learners should be given the opportunity to practise demonstrating skills in creating events plans and participating in role-play activities where event briefs are discussed, roles and responsibilities are agreed, and plans are drawn up.

Preparation for an event

Tutors lead a discussion about the aspects of the event plan that will require preparation, including sourcing a suitable venue, sourcing equipment and resources, making arrangements for travel and accommodation, producing participant information such as an agenda, joining instructions and directions. Online web pages relating to venues, transport and resources should be explored and scenario-based group activities would provide opportunities for learners to search for options that provide value for money. Discussions on the importance of timely communication of event-related information will raise awareness of the need to be organised and allow sufficient time to complete preparation tasks to aid efficient distribution of the information. Practical activities that give learners opportunities to set up a venue in preparation for the event would be beneficial. This would allow learners to demonstrate skills while being aware of considerations such as health and safety, access and power and data supply points, checking equipment is in working order, as well as the chance to foresee problems that could be resolved before the event. Learners should be given the opportunity to practise demonstrating skills using business technology, equipment and software to produce event-related information.

Visits to local business conferencing venues would provide opportunity for learners to experience the environment typically used for events, room set-up and speak with events management staff to obtain further information about preparing for events.

Suggested time: about 12 hours.

Activity: Providing administrative support to a business event in accordance with agreed standards and expectations

Welcoming and registering participants

Use of video clips of customer service being delivered in the context of a business event would be useful to demonstrate the use of communication skills, listening skills, positive attitudes, professional behaviours and actions required to meet the needs of meeting and event participants. Discussions on the registration process and the types of needs participants may have during the event would raise awareness of the need for learners to be adaptable in order to respond to individual needs such as wheelchair access, resources in alternative formats such as large print, audio or braille. Learners could undertake role-play activities to practise meeting and greeting participants, providing information regarding facilities and registering attendance of participants.

Responding to queries, problems and complaints

Tutor-led presentations about the types of issues and problems learners may experience during an event, such as environmental issues, incomplete participant information or resources and issues with equipment, and how to efficiently and effectively resolve these issues would provide a greater insight for learners into problem-solving skills and how to identify options to solve such problems. Scenario or role-play activities that present different queries, problems and complaints for learners to respond to would be advantageous and provide breadth of knowledge and understanding of a range of situations and how best to approach them. Tutor-led presentations on minimising conflict and effective communication in challenging situations would provide learners with techniques that could be applied in these circumstances to diffuse difficult situations.

Taking and distributing minutes/notes

Tutors lead presentations on standard conventions for producing meeting minutes for different types of meetings and events. Group discuss the legal requirements for producing minutes, as well as procedures and standards expected by organisations and the importance of following them. This would provide a greater understanding behind the need for accurate meeting minutes to be taken. Learners would benefit from examining examples of meeting minutes to familiarise them with the document format and typical content. Practical activities that give learners opportunities to practise taking meeting minutes would develop active listening skills, ability to take notes quickly and accurately, and seeking clarification of points raised. Learners could be given meeting minute templates to transpose notes into formal meeting minute documents. Learners would also benefit from shadowing work colleagues during meetings to share best practice when taking minutes.

Follow-up activities after an event

Tutors lead a presentation on the types and importance of follow-up activities. Practical activities where learners return work areas to original layouts and carry out cleaning and tidying activities would develop teamwork skills and a sense of respect and consideration for future users of the venue. Groups could discuss the procedures for paying for services, including checking invoices are correct for the services provided, agreeing payment methods and requesting VAT receipts. Examples of participant questionnaires would provide opportunity for learners to familiarise themselves with the type of information an organisation may find useful that can be obtained from participants, including suitability and location of the venue, facilities and cleanliness, refreshments, resources, general approach and professionalism of staff, availability of information, and whether the event achieved its objectives. Learners could practise drafting questionnaires using paper-based methods or online services such as SurveyMonkey. Tutors lead a discussion on how to analyse feedback from participants to provide quantitative and qualitative information to colleagues about the success of the event as well as identify opportunities for improvement.

Suggested time: about 17 hours.

Essential resources

For this unit, learners will need the opportunity to be involved in the planning, organising and supporting of a realistic internal business event and will need access to the necessary resources, facilities and equipment to enable them to carry out the necessary activities for the assessment.

Links to other units

This unit draws on the knowledge and skills taught in:

- Unit 1: Understanding Administrative Services
- Unit 2: Providing Administrative Services
- Unit 3: Using Business Technology to Process and Communicate Information.

Employer involvement

Employer involvement may be used to enhance the delivery of more specialist teaching areas, for example, employers could be involved in delivering a masterclass in event management practices, particularly in the context of complying with legal and local requirements. Employer involvement would also be useful in providing learners with exemplars of event plan templates and event feedback forms or questionnaires.

4 Planning your programme

Is there a learner entry requirement?

As a centre, it is your responsibility to ensure that recruited learners have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect learners to have qualifications at or equivalent to Level 1.

Learners are most likely to succeed if they have:

- three or four GCSEs at intermediate grades and/or
- BTEC qualification(s) at Level 1 or Level 1/2
- Level 1 equivalent achievement in English and mathematics through GCSE or Functional Skills.

Learners may demonstrate ability to succeed in various ways. For example, learners may have relevant work experience or specific aptitude shown through diagnostic tests or non-education experience.

What is involved in becoming an approved centre?

All centres must be approved before they can offer this qualification – so that you are ready to assess learners and so that we can provide the support needed. Further information is given in *Section 8 Administrative arrangements*.

What level of sector knowledge is needed to deliver this qualification?

We do not set any requirements for tutors but expect centres to assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date with current industry practice. This will give learners a rich programme to prepare them for progression.

What resources are required to deliver this qualification?

As part of your centre approval, you will need to show that the necessary material resources and workspaces are available to deliver the qualification. For some units, specific resources are required.

What makes good vocational teaching?

The approach to vocational teaching must be led by what is right for the particular sector. Therefore, each unit includes delivery guidance and suggested assessment tasks. Using the delivery guidance and suggested assessment tasks, and our additional free delivery guidance and assignment briefs, you can build a course that contextualises learning in real-life and/or employment scenarios. This will naturally draw in the kind of broader attributes valued in the sector, for example using a range of office equipment to complete administrative tasks, as well as the more general skills needed in work that fit well with project-based learning, for example teamwork and independent learning.

What are the requirements for meaningful employer involvement?

This qualification has been designed as a Technical Certificate qualification and as an approved centre you are required to ensure that during their study, every learner has access to meaningful activity involving employers. See *Section 2 Structure* for the requirements for employer involvement.

Support for employer involvement

It is important that you give learners opportunities that are of a high quality and that are directly relevant to their study. We will support you in this through guidance materials and by giving you examples of best practice. See *Section 11 Resources and support* for details of the support available, including the Work Experience Toolkit.

What support is available for delivery and assessment?

We provide a wealth of support materials, including schemes of learning, delivery plans, assignment briefs, additional papers for external assessments and examples of marked learner work.

To support you with planning your assessments, you will be allocated a Standards Verifier early in the planning stage. There will be extensive training programmes and support from our Subject Advisor team.

For further details see *Section 11 Resources and support*.

How will my learners become more employable through this qualification?

This qualification is mapped to the Business and Administration National Occupational Standards and the Trailblazer Business Administrator Apprenticeship Standard.

Learners will be acquiring the key technical and sector knowledge, and practical and technical skills that employers need. Employability skills, such as teamwork and entrepreneurialism, and completing realistic tasks have also been built into the design of the learning aims and content. This gives tutors the opportunity to use relevant contexts, scenarios and materials to enable learners to develop a portfolio of evidence that demonstrates the breadth of their skills and knowledge in a way that equips them for employment.

5 Assessment structure

The Pearson BTEC Level 2 Technical Certificate in Business Administration is assessed using a combination of *internal assessments*, which are set and marked by tutors, and an *external assessment*, which is set and marked by Pearson.

We have taken great care to ensure that the assessment method chosen is appropriate to the content of the unit and is in line with requirements from employers.

In developing an overall plan for delivery and assessment for the programme, you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place.

One internally-assessed unit in the qualification is defined as synoptic (see *Section 2 Structure*). A synoptic assessment is one that a learner should take later in a programme and in which they will be expected to apply learning from a range of units. As such, you must plan the assignments so that learners can demonstrate learning from across their programme.

We have addressed the need to ensure that the time allocated to final assessment of internal and external units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

In administering internal and external assessment, the centre needs to be aware of the specific procedures and policies that apply, for example to registration, entries and results. An overview with signposting to relevant documents is given in *Section 8 Administration arrangements*.

6 Internal assessment

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Guide to Quality Assurance* available on our website. All members of the assessment team need to refer to this document.

For this qualification, it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. You can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

When internal assessment is operated effectively, it is challenging, engaging, practical and up to date. It must also be fair to all learners and meet national standards.

Principles of internal assessment

Our approach to internal assessment for this qualification offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, which we explain in *Section 3 Units*, and the requirements for delivering assessment given in *Section 8 Administrative arrangements*.

Operating internal assessment

The assessment team

It is important that there is an effective team for internal assessment so that all assessment is planned and verified. For this qualification it is likely that the team will be small but it is still necessary to ensure that the assessment process is followed. Full information is given in the *Pearson Guide to Quality Assurance*.

The key roles are:

- the Lead Internal Verifier (Lead IV) for the qualification has responsibility for the planning, record keeping and standard setting for the qualification. The Lead IV registers with Pearson annually and organises training using our support materials
- Internal Verifiers (IVs) check that assignments and assessment decisions are valid and that they meet our requirements. In a small team, all people will normally be assessors and IVs. No one can verify their own actions as an assessor.
- assessors set or use assignments to assess learners to national standards.

Planning and record keeping

The Lead IV should make sure that there is a plan for assessment of the internally-assessed units and maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Guide to Quality Assurance*.

Effective organisation

Internal assessment needs to be well organised so that learners' progress can be tracked and so that we can monitor that assessment is being carried out in line with national standards. We support you through, for example, providing training materials and sample documentation. Our online myBTEC service can help support you in planning and record keeping. Further information on using myBTEC can be found in *Section 11 Resources and support* and on our website.

It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

Learner preparation

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualifications. Learners need to understand how assignments are used, the importance of meeting assignment deadlines and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme, and how learners should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

You are encouraged to employ a range of formative assessment approaches before putting learners through to the assignments to formally assess the units. Formative assessment supports teaching and learning, and should be ongoing throughout the learning process. It enables tutors to enhance learning by giving learners constructive feedback so that they can identify their strengths and weaknesses and to put measures in place to target areas that need work. Formative assessment approaches that incorporate reflective learning and regular skills assessment are important in encouraging self-development and reflective practice, to ensure that learners progress.

Setting assignments

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. This assignment will be separate from the practice and exploration activities that have been used during the learning period, and learners must understand that the assignment is being used to judge the learning aims. There may be specific observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome, based on the assessment criteria.

When setting your assignments, you need to work with the information given in the *Essential information for assessment decisions* and the *Assessment activity* sections of the units. You can choose to use the suggested scenarios or to adapt them to take account of local circumstances, provided that assignments are verified.

In designing your own assignment briefs you should bear in mind the following points.

- A learning aim must always be assessed as a whole and must not be spilt into two or more tasks.

- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.

- Learners should be given clear tasks, activities and structures for evidence; the criteria should not be given as tasks.

- You must ensure that assignments for synoptic assessment are designed to enable learners to draw on the specific units identified and demonstrate that they can identify and use effectively an appropriate selection of skills, techniques, concepts, theories and knowledge in an integrated way. Assignments for the synoptic unit will be monitored at programme level as part of the standards verification process to ensure that they encourage learners to select and apply their learning from across the qualification in an integrated way.

- Where there is a requirement for assessment to be conducted in the real work environment (mandatory work placement), assignments must be designed to facilitate this. Where there is no mandatory requirement for workplace assessment but learners will be in work placement or work experience settings as a part of the programme, then it would be worthwhile if these assignments were also designed for completion in the real work environment. You must ensure that the work placement or work experience setting gives learners the opportunity to achieve at all grade levels.

As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning objective. The specified teaching content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out a practical performance, then they must address all the relevant range of content that applies in that instance.

An assignment brief should have:

- a vocational scenario or context that motivates the learner to apply their learning through the assignment

- an audience or purpose for which the evidence is being provided

- clear instructions to the learner about what they are required to do, normally set out through a series of tasks.

Forms of evidence

The units allow for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim and the learner being assessed. For most units, the practical demonstration of skills is necessary. The units give you information on suitable forms of evidence that would give learners the opportunity to apply a range of transferable and sector skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

The main forms of evidence include:

- observation and recordings of practical tasks or performance in the workplace with supporting evidence

- projects

- recordings of role play, interviews and other types of simulated activities

- oral or written presentations with assessor questioning

- work logbooks, reflective journals.

It is important to note that an observation record is a source of evidence and does not confer an assessment decision. It must be sufficiently detailed to enable others to make a judgement about the quality and sufficiency of the performance and must clearly document the rationale for the assessment decision. Observation records should be accompanied by supporting evidence, which may take the form of videos, audio recordings, photographs, preparation notes, learner logs and other similar types of record.

The form(s) of evidence selected must allow:

- the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- the learner to produce evidence that is their own independent work
- a verifier to independently reassess the learner to check the assessor's decisions.

Centres need to take particular care in ensuring that learners produce independent work.

Making valid assessment decisions

Assessment decisions through applying unit-based criteria

Assessment decisions for this qualification are based on the specific criteria given in each unit and set at each grade level. The way in which individual units are written provides a balance of assessment of sector-specific knowledge, technical and practical skills, and transferable skills appropriate to the purpose of the qualification.

Pass, Merit and Distinction criteria all relate to individual learning aims. The assessment criteria for a unit are hierarchical and holistic where in satisfying the M criteria a learner would also have satisfied the P criteria. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the learner's evidence at the same time.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and all the Pass and Merit criteria); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and all the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 2 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as Unclassified.

Making assessment decisions using criteria

As an assessor, you review authenticated learner work and make judgements on standards using the assessment criteria and the supporting information provided in units and training materials. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive.

Assessors should use the following information and support in reaching assessment decisions:

- the *Essential information for assessment decisions* section in each unit
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Once the team has agreed the outcome, a formal assessment decision is recorded and reported to learners. The information given:

- must show the formal decision and indicate where criteria have been met
- may show where attainment against criteria has not been demonstrated
- must avoid giving direct, specific instructions on how the learner can improve the evidence to achieve a higher grade.

Authenticity of learner work

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Once an assessment has begun, learners must not be given feedback that relates specifically to their evidence and how it can be improved, learners must work independently.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 8 Administrative arrangements*.

Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, for example that the learner has not performed as expected

- making sure that giving a further opportunity does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners

- checking that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who did not complete assignments by your planned deadline or an authorised extension deadline, if one was given for specific circumstances, may not have the opportunity to subsequently resubmit. Similarly, learners who submit work that is not their own should not be given an opportunity to resubmit.

The outcome of any resubmission of the assignment by the learner is then recorded as the final decision.

A learner who has not achieved their expected level of performance in the relevant learning aims **after resubmission** of an assignment may be offered a single retake opportunity using a new assignment. The highest grade that may be awarded is a Pass.

The Lead IV must authorise a retake with a new assignment only in exceptional circumstances and where it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity you should refer to the *BTEC Centre Guide to Assessment* available on our website. We provide information on writing assignments for retakes on our website (www.btec.co.uk/keydocuments).

7 External assessment

A summary of the type and availability of external assessment for this qualification is given below. The external assessment assesses a unit that is 25% of the total qualification GLH and is weighted to contribute the same proportion of the overall qualification grade. The external assessment for these qualification is available so that learners may be assessed at any suitable point in their programme.

See the units and sample assessment materials for more information.

Unit	Type	Availability
Unit 1: Understanding Administrative Services	• Onscreen test set and marked by Pearson. • 75 minutes. • 60 marks.	On demand First assessment January 2018

For *Unit 1*, onscreen tests are available on demand starting from January 2018. These tests use a range of question types, including examiner-marked. As tests have a full marking process, results for individual learners will be released once the process is complete and the time to issue results will vary.

Learners must be prepared for external assessment by the time they undertake it. In preparing learners for assessment, you will want to take account of required learning time and the opportunities for resits. Learners who take an external assessment and who do not perform as expected may have one further opportunity using a later external assessment. Learners cannot take a further assessment until they have a result from the first assessment.

Learners who attempt an external assessment twice will have the better of the grades achieved used in the final grade calculation for the qualification.

Units

The externally-assessed units have a specific format, which we explain in *Section 3 Units*.

The content of units will be sampled across external assessments over time through appropriate papers. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors.

Sample assessment materials

Each externally-assessed unit has a set of sample assessment materials (SAMs) that accompanies this specification. The SAMs are there to give you an example of what the external assessment will look like in terms of the feel and level of demand of the assessment.

The SAMs show the range of possible activity types that may appear in the actual assessments and give you a good indication of how the assessments will be structured. While SAMs can be used for practice with learners, as with any assessment the content covered and specific details of the activities will vary in each assessment.

These sample assessments can be downloaded from our website.

Conducting external assessments

Centres must make arrangements for the secure delivery of external assessments. You need to ensure that learners are aware that they need to work independently and be aware of the requirements for any external assessment.

Each external assessment has a defined degree of control under which it must take place. We define degrees of control as follows.

High control

This is the completion of assessment in formal invigilated examination conditions. This applies to onscreen tests.

8 Administrative arrangements

Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification.
It will be of value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal and external assessment. You need to refer to our *Information Manual* for information on making registrations for the qualification and entries for external assessments.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a different pathway specialism, then the centre must transfer the learner appropriately.

Access to assessment

Both internal and external assessments need to be administered carefully to ensure that all learners are treated fairly, and that results and certification are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

Administrative arrangements for internal assessment

Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in our *Information Manual.* Records must be maintained as specified as we may ask to audit them.

Reasonable adjustments to assessment

To ensure that learners have fair access to demonstrate the requirements of the assessments, a reasonable adjustment is one that is made before a learner takes an assessment. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally assessed units*.

Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration only in line with the policy.

Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment being conducted unfairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in our policy *Enquiries and appeals about Pearson Vocational Qualifications*.

Administrative arrangements for external assessment

Entries and resits

For information on the timing of assessment and entries, please refer to the annual examinations timetable on our website. Learners are permitted to have one resit of an external assessment.

Access arrangements requests

Access arrangements are agreed with Pearson before an assessment. They allow learners with special educational needs, disabilities or temporary injuries to:

• access the assessment

• show what they know and can do without changing the demands of the assessment.

Access arrangements should always be processed at the time of registration. Learners will then know what type of arrangements are available in place for them.

Granting reasonable adjustments

For external assessment, a reasonable adjustment is one that we agree to make for an individual learner. A reasonable adjustment is defined for the individual learner and informed by the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors to include the:

• needs of the learner with the disability

• effectiveness of the adjustment

• cost of the adjustment; and

• likely impact of the adjustment on the learner with the disability and other learners.

Adjustment may be judged unreasonable and not approved if it involves unreasonable costs, timeframes or affects the integrity of the assessment.

Special consideration requests

Special consideration is an adjustment made to a learner's mark or grade after an external assessment to reflect temporary injury, illness or other indisposition at the time of the assessment. An adjustment is made only if the impact on the learner is such that it is reasonably likely to have had a material effect on that learner being able to demonstrate attainment in the assessment.

Centres are required to notify us promptly of any learners who they believe have been adversely affected and request that we give special consideration. Further information can be found in the special requirements section on our website.

Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

The procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed.

Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Externally-assessed units

External assessment means all aspects of units that are designated as external in this specification, including preparation for tasks and performance. For these assessments, centres must follow the JCQ procedures set out in the latest version of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* (www.jcq.org.uk).

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Learner malpractice

Heads of Centres are required to report incidents of any suspected learner malpractice that occur during Pearson external assessments. We ask that centres do so by completing a *JCQ Form M1* (available at www.jcq.org.uk/exams-office/malpractice) and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

Learners must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Learners found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Teacher/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of centres are requested to inform the Investigations Team by submitting a *JCQ Form M2(a)* (available at www.jcq.org.uk/exams-office/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see Section 6.15 of the *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* document.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- mark reduction for external assessments
- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from heads of centres (on behalf of learners and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and Appeals* policy, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via pqsmalpractice@pearson.com who will inform you of the next steps.

Certification and results

Once a learner has completed all the required units for a qualification, even if final results for external assessments have not been issued, then the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

Results issue

Results for external assessment will be issued once marking is complete.

Qualification results will be issued once a learner has completed all components of the qualification and you have claimed certification. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

Post-assessment services

Once results for external assessments are issued, you may find that the learner has failed to achieve the qualification or to attain an anticipated grade. It is possible to transfer or reopen registration in some circumstances. Our *Information Manual* gives further information.

Changes to qualification requests

Where a learner who has taken a qualification wants to resit an externally-assessed unit to improve their qualification grade, you firstly need to decline their overall qualification grade. You must decline the grade before the certificate is issued. For a learner receiving their results in August, you should decline the grade by the end of September if the learner intends to resit an external assessment.

Additional documents to support centre administration

As an approved centre, you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- *Pearson Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- *Lead Examiners' Reports*: these are produced after each series for each external assessment and give feedback on the overall performance of learners in response to tasks or questions set.
- *Instructions for the Conduct of External Assessments*: explains our requirements for the effective administration of external assessments, such as invigilation and submission of materials.
- Regulatory policies: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
  - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
  - age of learners
  - centre guidance for dealing with malpractice
  - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

9 Quality assurance

Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

Continuing quality assurance and standards verification

On an annual basis, we produce the Pearson Quality Assurance Handbook. It contains detailed guidance on the quality processes required to underpin robust assessment, internal verification and planning of appropriate employer involvement.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Technical Certificate and Diploma qualifications include:

- making sure that all centres complete appropriate declarations at the time of approval

- undertaking approval visits to centres

- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment

- undertaking an overarching review and assessment of a centre's strategy for ensuring sufficient and appropriate engagement with employers at the beginning of delivery of any BTEC programme(s)

- undertaking a review of the employer involvement planned at programme level to ensure its appropriateness at a time when additional activities can be scheduled where necessary

- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation

- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for the BTEC Technical Certificate and Diploma qualifications. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

10 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in providing an overall qualification grade for each learner. The final grade awarded for a qualification represents a holistic performance across all of the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units will be balanced by a lower outcome in others.

Eligibility for an award

In order to be awarded the qualification, a learner must complete all units and achieve a Pass or above in all units. See *Section 2 Structure* for full details.

To achieve the qualification grade, learners must:

- achieve and **report a grade** (D, M or P) for all units within a valid combination
- achieve the **minimum number of points** at a grade threshold.

Where there are optional units in a qualification, it is the responsibility of the centre to ensure that a correct unit combination is adhered to. Learners who do not pass all the required units shown in the structure will not achieve the qualification. For example, learners who have not passed the required external unit or who have not taken enough units will not achieve that qualification even if they have enough points.

Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units (where available), the mandatory units along with the optional units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

The qualification is awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate	P to D

The *Calculation of qualification grade* table, shown further on in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up to date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. Our *Information Manual* gives full details.

Points available for internal units

The table below shows the number of **points** available for internal units. For each internal unit, points are allocated depending on the grade awarded.

	Unit size
	60 GLH
U	0
Pass	16
Merit	24
Distinction	32

Points available for the external unit

Raw marks from the external unit will be awarded **points** based on performance in the assessment. The points scores available for the external unit at grade boundaries are as follows.

	Unit size
	60 GLH
U	0
Pass	16
Merit	24
Distinction	32

We will automatically calculate the points for the external unit once the external assessment has been marked and grade boundaries have been set. For more details about how we set grade boundaries in the external assessment please go to our website.

Claiming the qualification grade

Subject to eligibility, we will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant calculation of qualification grade table for the cohort.

Calculation of qualification grade table

Certificate	
Grade	**Points threshold**
P	64
M	88
D	112

The table is subject to review over the lifetime of the qualification.
The most up-to-date version will be issued on our website.

Examples of grade calculations based on table applicable to registrations from September 2017

Example 1: Achievement of a Certificate with a P grade

Unit	GLH	Type	Grade	Points
1	60	External	Pass	16
2	60	Internal	Pass	16
3	60	Internal	Pass	16
4	60	Internal	Pass	16
	240		P	64

The learner has achieved a Pass or above in all units.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Certificate with a D grade

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	Internal	Merit	24
3	60	Internal	Distinction	32
4	60	Internal	Distinction	32
	240		D	112

The learner has sufficient points for a D grade.

Example 3: Achievement of a Certificate with an Unclassified result

Unit	GLH	Type	Grade	Points
1	60	External	Unclassified	0
2	60	Internal	Distinction	32
3	60	Internal	Distinction	32
4	60	Internal	Distinction	32
	240		**U**	**96**

The learner has a U in Unit 1.

The learner has sufficient points for an M but has not met the requirement for a Pass, or above, in all units.

11 Resources and support

Our aim is to give you support to enable you to deliver Pearson BTEC Level 2 Technicals with confidence. You will find resources to support teaching and learning, assessing, and professional development on our website.

Support for setting up your course and preparing to teach

Schemes of Learning

Our free Schemes of Learning give you suggestions and ideas for how to deliver the units in the qualifications, including opportunities to develop employability skills, tips on embedding mathematics and English, and how to link units through holistic assessments.

Delivery planner

High-level models showing how the course can be delivered over different timescales, for example six months, one year or two years.

myBTEC

myBTEC is a free, online toolkit that lets you plan and manage your BTEC provision from one place. It supports the delivery, assessment and quality assurance of BTEC qualifications in centres and supports teachers with the following activities:

- checking that a programme is using a valid combination of units
- creating and verifying assignment briefs (including access to a bank of assignment briefs that can be customised)
- creating assessment plans and recording assessment decisions
- tracking the progress of every learner throughout their programme.

To find out more about myBTEC, visit the myBTEC page on the support services section of our website.

Support for teaching and learning

Work Experience Toolkit

Our free Work Experience Toolkit gives guidance for tutors, assessors, work-based supervisors and learners on how to make the most of work placements and work experience.

Pearson Learning Services provides a range of engaging resources to support BTEC qualifications.

Teaching and learning resources may also be available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources are on our website.

Support for assessment

Sample assessment materials for externally-assessed units

Sample assessment materials (SAMs) are available for externally-assessed units and can be downloaded from the Pearson Qualifications website. An additional set of sample assessment materials for externally-assessed units will also be available, giving your learners further opportunities for practice.

Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences.

We provide assignment briefs which are approved by Pearson Standards Verifiers.

Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of sample marked learner work will be made available on our website.

Training and support from Pearson

People to talk to

There are lots of people who can support you and give you advice and guidance on delivering your Pearson BTEC Level 2 Technicals. They include the following.

- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, in preparing learner work and providing quality assurance through sampling.

- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment.

- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events.

- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

Training and professional development

We provide a range of training and professional development events to support the introduction, delivery, assessment and administration of the Pearson BTEC Level 2 Technicals

These sector-specific events, developed and delivered by specialists, are available both face to face and online.