

# **Pearson BTEC Entry Level Award in Business Administration (Entry 3)**

# **Pearson BTEC Level 1 Award/Certificate/ Diploma in Business Administration**

## **Specification**

Issue 6: June 2016

First teaching September 2010

Amended Specification for First Teaching September 2013

Pearson Education Limited is one of the UK's largest awarding organisations, offering academic and vocational qualifications and testing to schools, colleges, employers and other places of learning, both in the UK and internationally. Qualifications offered include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications, ranging from Entry Level to BTEC Higher National Diplomas. Pearson Education Limited administers BTEC qualifications.

Through initiatives such as onscreen marking and administration, Pearson is leading the way in using technology to modernise educational assessment, and to support teachers and learners.

These qualifications were previously entitled:

Pearson BTEC Entry Level Award in Business Administration (Entry 3) (QCF)

Pearson BTEC Level 1 Award in Business Administration (QCF)

Pearson BTEC Level 1 Certificate in Business Administration (QCF)

Pearson BTEC Level 1 Diploma in Business Administration (QCF)

The QNs remain unchanged.

This specification is Issue 6. Key changes are listed in the summary table on next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: [qualifications.pearson.com](http://qualifications.pearson.com)

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# Summary of Pearson BTEC Entry Level Award in Business Administration (Entry 3)/ Pearson BTEC Level 1 Award/Certificate/Diploma in Business Administration specification Issue 6 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	Section 2
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 6
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html).



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## Purpose of this specification

The purpose of a specification, as defined by Ofqual, is to set out:

- the qualification's objective
- any other qualification which a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding which the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements which a learner must have satisfied before the learner will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding which will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which learners' level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.



# 1 Introducing BTEC Specialist qualifications

For more than 25 years, BTECs have earned their reputation as well-established, enduringly effective qualifications. They have a proven track record of improving motivation and achievement. BTECs also provide progression routes to the next stage of education or to employment.

## What are BTEC Specialist qualifications?

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BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

## Sizes of Specialist qualifications

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For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

## 2 Qualification summary and key information

Qualification title	Pearson BTEC Entry Level Award in Business Administration (Entry 3)
Qualification Number (QN)	500/5525/2
Date registrations can be made	1 <sup>st</sup> September 2008
Age range that the qualification is approved for	14-16 16-18 19+
Credit value	6
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	60
Guided learning hours	50
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners can register for this qualification. However, centres must follow the <i>Edexcel Access and Recruitment Policy</i> (see Section 10, Access and recruitment)

Qualification title	Pearson BTEC Level 1 Award in Business Administration
Qualification Number (QN)	500/4992/6
Date registrations can be made	1 <sup>st</sup> September 2008
Age range that the qualification is approved for	14-16 16-18 19+
Credit value	7
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	70
Guided learning hours	50
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners can register for this qualification. However, centres must follow the <i>Edexcel Access and Recruitment Policy</i> (see Section 10, Access and recruitment)

Qualification title	Pearson BTEC Level 1 Certificate in Business Administration
Qualification Number (QN)	500/4991/4
Date registrations can be made	1 <sup>st</sup> September 2008
Age range that the qualification is approved for	14-16 16-18 19+
Credit value	13
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	130
Guided learning hours	100
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners can register for this qualification. However, centres must follow the <i>Edexcel Access and Recruitment Policy</i> (see Section 10, Access and recruitment)

Qualification title	Pearson BTEC Level 1 Diploma in Business Administration
Qualification Number (QN)	500/6536/1
Date registrations can be made	1 <sup>st</sup> September 2009
Age range that the qualification is approved for	14-16 16-18 19+
Credit value	37
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	370
Guided learning hours	295
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners can register for this qualification. However, centres must follow the <i>Edexcel Access and Recruitment Policy</i> (see Section 10, Access and recruitment)

## Qualification title and Qualification Number

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Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, units and QN will appear on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. Further information about certification is in the *Edexcel Information Manual* on our website at [www.edexcel.com](http://www.edexcel.com)

## Objective of the qualifications

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The Pearson BTEC Entry Level Award in Business Administration (Entry 3) and the Pearson BTEC Level 1 Award, Certificate and Diploma in Business Administration have been developed to give learners the opportunity to:

- engage in learning which is relevant to them and will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised Entry 3 or Level 1 vocationally-related qualification
- progress to employment in a particular vocational sector
- progress to related general and/or vocational qualifications.

## Progression opportunities through Pearson qualifications

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Learners who achieve the Pearson BTEC Entry Level Award (Entry 3) and Pearson BTEC Level 1 Award, Certificate and Diploma in Business Administration can progress to:

- GCSEs and/or A Levels
- Diplomas
- apprenticeships
- supported employment
- independent living.

## Industry support and recognition

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These qualifications are supported by the Council for Administration, the Sector Skills Council (SSC) for business and administration.

### 3 Centre resource requirements

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

#### General resource requirements

- Centres must have appropriate physical resources (for example equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualifications.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place to make sure continuing professional development for staff delivering the qualifications.
- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation.

#### Specific resource requirements

As well as the general resource requirements above, there are specific resource requirements that centres must meet.

Unit	Resources required
Unit 2: Managing Your Health at Work	Learners will require access to appropriate information about how to keep healthy at work.
Unit 3: Preparing for Work Placement	In order to make this unit relevant, the learner must be preparing to go on a suitable work placement. Employers must also be prepared for the upcoming work placement and support the learner in gathering relevant information.
Unit 4: Learning from Work Placement	The learner must attend a work placement prior to undertaking this unit.
Unit 5: Working in Business and Administration	Centres need access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.
Unit 6: Professional Behaviour in an Office Environment	There are no essential resources for this unit. However, DVDs, videos and guest speakers can provide useful examples of how to behave professionally in an office.

Unit	Resources required
Unit 7: Using Office Equipment in a Business Environment	Centres need to have access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.
Unit 8: Using a Computer in Business Administration	<p>The most significant resource for this unit would be contact with organisations that use IT and/or need to employ IT professionals in a variety of administrative roles. Both would offer a perspective on the nature of work in the business administration sector. The learner could have contact with a range of such organisations. Visits to, or representatives from, these organisations will be valuable for learners.</p> <p>Care should be taken over appropriate support reading or internet materials. They need to be focused on the work of the unit and at an appropriate level for development of the learner. Internet and library information is useful but care should be taken that information is current.</p> <p>Suggested reading should reflect the focus of the learner group and support developing understanding and practice related to the group's study area.</p>
Unit 10: Using Email	To deliver this unit centres will need to have a LAN with email application software or access to web-based emailing software and access to the internet. Centres will need the facilities to enable learners to carry out the practical aspects of the unit as defined by the content and assessment criteria. Centres will also need a range of suitable software tools and equipment to support the cohort size undertaking the unit.
Unit 13: Managing Your Health at Work	Learners will require access to appropriate information about health requirements and potential health risks for specific types of work.



Unit	Resources required
Unit 14: Preparing for Work Placement	To make this unit relevant, the learner must be in the process of preparing to go on a suitable work placement. Employers must be prepared for the learner arriving and support them in gathering relevant information.
Unit 15: Learning from Work Placement	Learners must undertake a period of work placement before taking this unit.
Unit 16: Working in Business and Administration	Centres need access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.
Unit 17: Communicating Electronically	Centres need to have access to typical office equipment such as a telephone and computer so that learners can practise and develop their skills when interacting with others. Learners will also need access to research facilities and internet access. The use of DVDs and videos is useful to illustrate interpersonal skills and how not to do it. Guest speakers can provide a valuable input to support the underpinning knowledge and understanding of the unit.
Unit 18: Making and Receiving Calls	Centres need to have access to typical office equipment, such as a telephone and a computer, so that learners can practise and develop their skills when interacting with others.
Unit 19: Welcome Visitors	Centres need access to a typical reception workplace, with suitable equipment and system that learners can practise and develop their skills. It could be a model office, the centre's administration office or a visit to an office at a local business. Visits to local organisations should be encouraged and guest speakers will add currency and vocational relevance to the topic.
Unit 20: Handling Mail	Visits to local organisations should be encouraged and guest speakers will give currency and vocational relevance to the topic.

Unit	Resources required
Unit 22: Recording Business Transactions	Centres need access to resources to support learners in developing and practising their skills when recording financial transactions. Examples of all documents outlined in the unit content should be provided, and learners should have access to office supplies catalogues, both paper-based and through websites.
Unit 23: Supporting Business Meetings	Centres need access to a suitable meeting room with facilities for learners to practise and develop their meeting support skills. This may be the classroom, meeting rooms at the centre or through a visit to a local business. Role play and simulations provide valuable opportunities for learners to practise skills. Examples of action planning checklists would be useful. Guest speakers and attendance (even briefly) at different business meetings can provide a valuable input to support learning.
Unit 28: Word Processing Software	Learners will need access to appropriate text processing software (Microsoft Word® or similar). In addition learners must have access to either different types of information, eg graphic images, or to other sources of information. Learners should also be given access to pre-prepared templates, tables and forms.
Unit 29: Using the Internet	To deliver this unit centres will need to have a LAN with browser application software and access to the internet. Centres will need the facilities to enable learners to carry out the practical aspects of the unit as defined by the content and assessment criteria. Centres will also need a range of suitable software tools and equipment to support the cohort size undertaking the unit.
Unit 30: Investigating Right and Responsibilities at Work	Learners need access to appropriate sources of information about rights and responsibilities in the workplace.

Unit	Resources required
Unit 31: Managing Your Health at Work	Learners need access to appropriate sources of information about maintaining good health at work.
Unit 32: Preparing for Work Placement	To make this unit relevant, the learner must be in the process of preparing to go on a suitable work placement. Employers must also be prepared for the upcoming work placement and support the learner to gather relevant information.
Unit 33: Learning from Work Placement	Learners will need to have undertaken a period of work experience.

## 4 Qualification structures

### Pearson BTEC Entry Level Award in Business Administration (Entry 3)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits required to achieve the qualification	6
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Minimum number of credits required from Group 1	4
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Remaining credits required to achieve the qualification can be taken from Groups 1 or 2	
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#### Group 1

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
5	H/600/1090	Working in Business and Administration	Entry 3	2	20
6	L/600/1097	Professional Behaviour in an Office Environment	Entry 3	2	20
7	R/600/1098	Using Office Equipment in a Business Environment	Entry 3	3	30
8	M/501/7234	Using a Computer in Business Administration	Entry 3	3	30
9	T/501/7235	Managing Own Learning	Entry 3	3	30
10	J/502/0172	Using Email	Entry 3	1	10
11	T/502/0166	I.T User Fundamentals	Entry 3	2	15

#### Group 2

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
1	H/503/2815	Investigating Rights and Responsibilities at Work *	Entry 3	1	10
2	K/503/2816	Managing Your Health at Work *	Entry 3	1	10
3	T/503/2821	Preparing for Work Placement *	Entry 3	1	10
4	A/503/2822	Learning from Work Placement *	Entry 3	2	10

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
12	K/503/2847	Investigating Rights and Responsibilities at Work *	1	1	10
13	M/503/2848	Managing Your Health at Work *	1	1	10
14	F/503/2854	Preparing for Work Placement *	1	1	10
15	J/503/2855	Learning from Work Placement *	1	2	10
16	F/502/4009	Working in Business and Administration	1	3	30
17	A/501/7236	Communicating Electronically	1	3	30
18	T/502/4007	Making and Receiving Calls	1	2	20
19	M/502/4006	Welcome Visitors	1	2	20
20	A/502/4008	Handling Mail	1	2	20
21	K/502/4005	Creating Business Documents	1	3	30
22	J/501/7238	Recording Business Transactions	1	4	30
23	F/501/7240	Supporting Business Meetings	1	4	30
24	K/504/9146	Carrying out an Individual Project	1	3	30
25	R/503/2857	Planning an Enterprise Activity	1	1	10
26	Y/503/2858	Running an Enterprise Activity	1	1	10
27	R/501/7243	Job Opportunities in Business Administration	1	4	30
28	L/502/4627	Word Processing Software	1	3	20
29	T/502/4296	Using the Internet	1	3	20
30	M/503/2879	Investigating Right and Responsibilities at Work *	2	1	10
31	H/503/2880	Managing Your Health at Work *	2	1	10
32	F/503/2885	Preparing for Work Placement *	2	1	10
33	L/503/2887	Learning from Work Placement *	2	2	10
34	R/503/2843	Working in a Team	1	3	30

\* Learners may take these units at one level only.

## Pearson BTEC Level 1 Award in Business Administration

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits required to achieve the qualification	7
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Minimum number of credits required from Group 1	4
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Remaining credits required to achieve the qualification can be taken from Groups 1 or 2

### Group 1

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
16	F/502/4009	Working in Business and Administration	1	3	30
17	A/501/7236	Communicating Electronically	1	3	30
18	T/502/4007	Making and Receiving Calls	1	2	20
19	M/502/4006	Welcome Visitors	1	2	20
20	A/502/4008	Handling Mail	1	2	20
21	K/502/4005	Creating Business Documents	1	3	30
22	J/501/7238	Recording Business Transactions	1	4	30
23	F/501/7240	Supporting Business Meetings	1	4	30
27	R/501/7243	Job Opportunities in Business Administration	1	4	30
28	L/502/4627	Word Processing Software	1	3	20
29	T/502/4296	Using the Internet	1	3	20

### Group 2

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
1	H/503/2815	Investigating Rights and Responsibilities at Work *	Entry 3	1	10
2	K/503/2816	Managing Your Health at Work *	Entry 3	1	10
3	T/503/2821	Preparing for Work Placement *	Entry 3	1	10
4	A/503/2822	Learning from Work Placement *	Entry 3	2	10
5	H/600/1090	Working in Business and Administration	Entry 3	2	20

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
6	L/600/1097	Professional Behaviour in an Office Environment	Entry 3	2	20
7	R/600/1098	Using Office Equipment in a Business Environment	Entry 3	3	30
8	M/501/7234	Using a Computer in Business Administration	Entry 3	3	30
9	T/501/7235	Managing Own Learning	Entry 3	3	30
10	J/502/0172	Using Email	Entry 3	1	10
11	T/502/0166	I.T User Fundamentals	Entry 3	2	15
12	K/503/2847	Investigating Rights and Responsibilities at Work *	Level 1	1	10
13	M/503/2848	Managing Your Health at Work *	1	1	10
14	F/503/2854	Preparing for Work Placement *	1	1	10
15	J/503/2855	Learning from Work Placement *	1	2	10
24	K/504/9146	Carrying out an Individual Project	1	3	30
25	R/503/2857	Planning an Enterprise Activity	1	1	10
26	Y/503/2858	Running an Enterprise Activity	1	1	10
30	M/503/2879	Investigating Right and Responsibilities at Work *	2	1	10
31	H/503/2880	Managing Your Health at Work *	2	1	10
32	F/503/2885	Preparing for Work Placement *	2	1	10
33	L/503/2887	Learning from Work Placement *	2	2	10
34	R/503/2843	Working in a Team	1	3	30

\* Learners may take these units at one level only.

## Pearson BTEC Level 1 Certificate in Business Administration

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits required to achieve the qualification	13
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Minimum number of credits required from Group 1	7
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Remaining credits required to achieve the qualification can be taken from Groups 1 or 2

### Group 1

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
16	F/502/4009	Working in Business and Administration	1	3	30
17	A/501/7236	Communicating Electronically	1	3	30
18	T/502/4007	Making and Receiving Calls	1	2	20
19	M/502/4006	Welcome Visitors	1	2	20
20	A/502/4008	Handling Mail	1	2	20
21	K/502/4005	Creating Business Documents	1	3	30
22	J/501/7238	Recording Business Transactions	1	4	30
23	F/501/7240	Supporting Business Meetings	1	4	30
27	R/501/7243	Job Opportunities in Business Administration	1	4	30
28	L/502/4627	Word Processing Software	1	3	20
29	T/502/4296	Using the Internet	1	3	20

### Group 2

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
1	H/503/2815	Investigating Rights and Responsibilities at Work*	Entry 3	1	10
2	K/503/2816	Managing your Health at Work*	Entry 3	1	10
3	T/503/2821	Preparing for Work Placement*	Entry 3	1	10
4	A/503/2822	Learning from Work Placement*	Entry 3	2	10



Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
5	H/600/1090	Working in Business and Administration	Entry 3	2	20
6	L/600/1097	Professional Behaviour in an Office Environment	Entry 3	2	20
7	R/600/1098	Using Office Equipment in a Business Environment	Entry 3	3	30
8	M/501/7234	Using a Computer in Business Administration	Entry 3	3	30
9	T/501/7235	Managing Own Learning	Entry 3	3	30
10	J/502/0172	Using Email	Entry 3	1	10
11	T/502/0166	I.T User Fundamentals	Entry 3	2	15
12	K/503/2847	Investigating Rights and Responsibilities at Work *	1	1	10
13	M/503/2848	Managing Your Health at Work *	1	1	10
14	F/503/2854	Preparing for Work Placement *	1	1	10
15	J/503/2855	Learning from Work Placement *	1	2	10
24	K/504/9146	Carrying out an Individual Project	1	3	30
25	R/503/2857	Planning an Enterprise Activity	1	1	10
26	Y/503/2858	Running an Enterprise Activity	1	1	10
30	M/503/2879	Investigating Right and Responsibilities at Work*	2	1	10
31	H/503/2880	Managing Your Health at Work*	2	1	10
32	F/503/2885	Preparing for Work Placement*	2	1	10
33	L/503/2887	Learning from Work Placement*	2	2	10
34	R/503/2843	Working in a Team	1	3	30

\* Learners may take these units at one level only.

## Pearson BTEC Level 1 Diploma in Business Administration

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits required to achieve the qualification	37
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Minimum number of credits required from Group 1	20
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Remaining credits required to achieve the qualification can be taken from Groups 1 or 2

### Group 1

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
16	F/502/4009	Working in Business and Administration	1	3	30
17	A/501/7236	Communicating Electronically	1	3	30
18	T/502/4007	Making and Receiving Calls	1	2	20
19	M/502/4006	Welcome Visitors	1	2	20
20	A/502/4008	Handling Mail	1	2	20
21	K/502/4005	Creating Business Documents	1	3	30
22	J/501/7238	Recording Business Transactions	1	4	30
23	F/501/7240	Supporting Business Meetings	1	4	30
27	R/501/7243	Job Opportunities in Business Administration	1	4	30
28	L/502/4627	Word Processing Software	1	3	20
29	T/502/4296	Using the Internet	1	3	20

### Group 2

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
1	H/503/2815	Investigating Rights and Responsibilities at Work *	Entry 3	1	10
2	K/503/2816	Managing Your Health at Work*	Entry 3	1	10
3	T/503/2821	Preparing for Work Placement*	Entry 3	1	10
4	A/503/2822	Learning from Work Placement*	Entry 3	2	10

Unit	Unit Reference Number	Optional units	Level	Credit	Guided Learning Hours
5	H/600/1090	Working in Business and Administration	Entry 3	2	20
6	L/600/1097	Professional Behaviour in an Office Environment	Entry 3	2	20
7	R/600/1098	Using Office Equipment in a Business Environment	Entry 3	3	30
8	M/501/7234	Using a Computer in Business Administration	Entry 3	3	30
9	T/501/7235	Managing Own Learning	Entry 3	3	30
10	J/502/0172	Using Email	Entry 3	1	10
11	T/502/0166	I.T User Fundamentals	Entry 3	2	15
12	K/503/2847	Investigating Rights and Responsibilities at Work *	1	1	10
13	M/503/2848	Managing Your Health at Work *	1	1	10
14	F/503/2854	Preparing for Work Placement *	1	1	10
15	J/503/2855	Learning from Work Placement *	1	2	10
24	K/504/9146	Carrying out an Individual Project	1	3	30
25	R/503/2857	Planning an enterprise activity	1	1	10
26	Y/503/2858	Running an enterprise activity	1	1	10
30	M/503/2879	Investigating Right and Responsibilities at Work *	2	1	10
31	H/503/2880	Managing Your Health at Work*	2	1	10
32	F/503/2885	Preparing for Work Placement *	2	1	10
33	L/503/2887	Learning from Work Placement *	2	2	10
34	R/503/2843	Working in a Team	1	3	30

\* Learners may take these units at one level only.

## 5 Assessment

The table below gives a summary of the assessment methods used in the qualifications.

Units	Assessment methods
All units	Centre-devised assessment

### Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the assessment criteria. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for the learners to show what evidence is required. Assignment briefs should indicate clearly, which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must also meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (eg performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to provide learners with realistic scenarios and maximise the use of practical activities in delivery and assessment.

To avoid over assessment centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. See *Section 13. Further information and useful publications*.

## 6 Recognising prior learning and achievement

### Recognition of Prior Learning

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Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning. RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in the policy document *Recognition of Prior Learning Policy*, which is on the Edexcel website.

## 7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications. New centres must complete an *Edexcel Vocational Centre & Qualification Approval Form (VCQA)*.

Existing centres get 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres that already hold Edexcel centre approval are able to apply for qualification approval for a different level or different sector via Edexcel Online, up to and including level 3 only.

In some circumstances, qualification approval using Edexcel Online may not be possible. In such cases, guidance is available as to how an approval application may be made.

### Approvals agreement

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All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations. Edexcel will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

## 8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses Pearson BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC apprenticeship ('single click' registration):
  - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions.
- 2 Delivery of the qualification outside the apprenticeship:
  - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
  - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will allocate a Standards Verifier annually to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the *UK BTEC Quality Assurance Handbook* on our website.

## 9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Centres must make sure that any legislation is up to date and current.

## 10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to BTEC specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11, Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.



## 11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Edexcel's *Equality Policy* requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be 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 from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Details on how to make adjustments for learners with protected characteristics are given in the policy documents *Application of Reasonable Adjustment for BTEC and Edexcel NVQ Qualifications* and *Application for Special Consideration: BTEC and Edexcel NVQ Qualifications*.

The documents are on our website at [www.edexcel.com/policies](http://www.edexcel.com/policies)

# 12 Units

All units have the following sections.

## Unit title

This is the formal title of the unit that will appear on the learner's certificate.

## Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

## Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

## Credit value

When a learner achieves a unit, they gain the specified number of credits.

## Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

## Unit aim

This gives a summary of what the unit aims to do.

## Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

## Learning outcomes

Learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

## Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

## Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Some units may also have these sections.

## Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

## Information for tutors

This section gives tutors information on delivery and assessment. It contains the following sub-sections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Outline learning plan* – gives guidance for suggested activities and assignments
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

# **Unit 1: Investigating Rights and Responsibilities at Work**

**Unit reference number: H/503/2815**

**Level: Entry 3**

**Credit value: 1**

**Guided learning hours: 10**

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## **Unit aim**

This unit aims to provide learners with knowledge of the rights and responsibilities of employees, of how to consider the rights of others, and where in the workplace to get advice and support if problems arise.

## **Unit introduction**

All employees have rights and responsibilities. This unit will introduce learners to the concept of having rights at work and what their responsibilities are as employee. Learners will explore employee rights, for example to be safe at work, to be healthy at work, to have fair pay and to be treated fairly. They will also consider the importance of respecting others in the workplace. Practical examples such as appropriate use of language and respecting people's cultures and beliefs will be discussed.

The unit goes on to explore the responsibilities that the learner has when they are employed or participating in work experience. Learning will focus around their responsibility to arrive on time, dress appropriately and complete tasks efficiently and effectively within agreed timelines.

It is very important to know who to go to for support if difficulties arise at work. Learners will research different sources of support that available to them both.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know rights of employees in the workplace	1.1	Identify aspects of working life where employees have rights	<ul style="list-style-type: none"> <li>□ <i>Workplace rights</i>: own rights in the workplace, e.g. salary or wages, contract for employment, termination of employment, discrimination and harassment, dealing with trouble at work, health and safety, working hours, holiday entitlement, breaks, leave entitlement, privacy of personal information (Data Protection Act)</li> </ul>
2	Know how to respect the rights of others in the workplace	2.1	Outline how the rights of others should be respected in the workplace	<ul style="list-style-type: none"> <li>□ <i>Respecting the rights of others</i>: respecting others, e.g. right to express opinions and ideas, respect other cultures, religions and views, appropriate use of language, knowledge of what could offend, privacy of others' personal information</li> </ul>
3	Know employee responsibilities in the workplace	3.1	Identify responsibilities of employees in the workplace	<ul style="list-style-type: none"> <li>□ <i>Workplace responsibilities</i>: health and safety; understand what the employee is expected to do at work; punctuality; reliability; honesty; complete tasks allocated; follow instruction</li> </ul>
4	Know where to get help for problems with rights and responsibilities at work	4.1	Identify sources of help for problems with rights and responsibilities within the workplace	<ul style="list-style-type: none"> <li>□ <i>Sources of help and advice</i>: advisers, e.g. line manager, human resources department, occupational health, health and safety adviser; documents, e.g. policies, staff handbook, intranet, trade unions</li> </ul>

## Information for tutors

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### Delivery

The focus of this unit is on the rights and responsibilities of the individual as an employee in the workplace. Reference to corresponding employer rights and responsibilities is likely to be made in any discussion of the issues, although it does not form part of the assessment for the unit.

Although learners do not need to have access to the workplace, it would be helpful if they could relate the learning to an actual workplace, either through past experience, a current job or work placement. They should have the opportunity to talk to others who have direct experience of the workplace in order to relate the theory to a real situation. They could also use role play and other simulations to increase their understanding.

Learners should be able to identify a range of areas where they have rights at work (for example right to a clean and safe workplace, to be treated fairly, to be paid a fair wage on time, not to be discriminated against on grounds of gender, sexual orientation, age, race, disability, religious beliefs). Knowledge of legislation is not required for this unit. Learners may be encouraged to gather information from a range of sources on their rights, e.g. Jobcentre Plus, library, internet.

Learners will require an opportunity to demonstrate an understanding that their own behaviour has an effect on the rights of others. Either within a workplace setting (for example at work for those already employed or on work placement) or through simulation, learners could show that they are respecting the rights of others. This might be through speaking in a way that does not cause offence, not distracting others, respecting other people's property, not putting other people in danger, or not discriminating unfairly against people. Learners could be encouraged to find the rights and responsibilities policy for their own setting. Discussion could focus on the appropriateness of the document, for example whether it is clear, easy to read and contains appropriate images which show respect for the rights of others.

In addition to the behaviours identified above, learners will need to identify their responsibilities to an employer (for example to follow instructions, to work to the best of their ability, to be honest, to be punctual, not to waste the employer's time, to follow company or organisational procedures such as phoning when they are ill and unable to come in to work or to present themselves neatly and cleanly in the workplace). Learners with access to the workplace could supplement their evidence with a witness statement to the effect that they are behaving as a responsible employee. The statement should make clear what behaviours have been observed.

Learners only need to identify sources of support for rights and responsibilities within the workplace (for example their supervisor, the human resources department, a staff handbook). They do not need to raise actual issues or problems, only to know where they could turn should such issues arise. Speakers may be invited to share their experiences of seeking advice in the workplace.

## Assessment

To achieve 1.1, learners must identify at least three different aspects of working life for which they have rights as an employee. Evidence could be presented in a range of formats, such as a poster or leaflet, a recorded discussion with the tutor or a list.

To achieve 2.1, learners must outline how the rights of others can be respected. In order to do this, learners could be provided with different scenarios or clips from a film or television programme. The clips or scenarios should highlight different situations, for example an employee dominating the conversation in a meeting or someone using offensive language. Learners could then explain how the situation could be changed to respect the rights of others.

For 3.1, learners need to identify at least three different responsibilities of employees in the workplace.

For 4.1, learners must identify three different sources of help if a problem arises with rights and responsibilities at work.

If any of the above evidence is provided as a result of discussions with the tutor, written evidence must be available for internal and external verification.

## Suggested resources

### Websites

<a href="http://www.acas.org.uk/">www.acas.org.uk/</a>	Arbitration service, advice on health and wellbeing at work
<a href="http://www.adviceguide.org.uk">www.adviceguide.org.uk</a>	Citizen Advice Bureau
<a href="http://www.direct.gov.uk/en/Employment/Employees/index.htm">www.direct.gov.uk/en/Employment/Employees/index.htm</a>	Advice on employment rights
<a href="http://www.gov.uk">www.gov.uk</a>	General rights and responsibilities in the workplace including rights for people with disabilities, carers, older people and young people
<a href="http://www.tuc.org.uk/">www.tuc.org.uk/</a>	Trades Union Congress (TUC) websites with downloadable leaflets about rights at work including details about minimum wage and equality in wages
<a href="http://www.worksmart.org.uk/rights/">www.worksmart.org.uk/rights/</a>	A TUC run website with information about rights at work (paternity and maternity leave, paid holiday etc)

## Unit 2:

# Managing Your Health at Work

**Unit reference number:** K/503/2816

**Level:** Entry 3

**Credit value:** 1

**Guided learning hours:** 10

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### Unit aim

This unit aims to introduce learners to the importance of being healthy at work, how to keep well at work and to provide knowledge of ways to achieve this.

### Unit introduction

Much of our time is spent at work. Our work and how we work can have a huge impact on our physical and mental wellbeing. During time spent at work, workers can suffer from everyday ailments and aches and pains including headaches, back problems and stress. It is important that people know how to look after themselves while they are at work so that they can stay healthy and work effectively.

Learners will explore different types of health issues that could arise in different working environments.

### Essential resources

Learners will require access to appropriate information about how to keep healthy at work.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know why it is important to be healthy at work	1.1	Outline why it is important to be healthy at work	<ul style="list-style-type: none"> <li>□ <i>Importance of being healthy at work:</i> e.g. work more efficiently, increased self-esteem, increased enjoyment of work, quality of work could suffer if worker is unhealthy, effects of unemployment on your health, the longer someone is out of work the harder it is to get back</li> </ul>
2	Know how to keep healthy at work	2.1	Identify ways of keeping healthy at work	<ul style="list-style-type: none"> <li>□ <i>Keeping healthy:</i> appropriate equipment, e.g. suitable chair, keyboard arm rests, foot rests; taking regular breaks; exercise; diet; adequate sleep, dealing effectively with stress</li> </ul>
		2.2	Identify possible health issues that may arise in different work environments	<ul style="list-style-type: none"> <li>□ <i>Health issues to consider in different work environments:</i> different needs for different environments, e.g. working in hospital, office, outdoors; different types of illnesses and injuries, e.g. repetitive strain injury, colds, flu and other illnesses; temperature in work environment, e.g. summer heat, cold, air conditioning, heating</li> </ul>

## Information for tutors

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### Delivery

During the delivery of this unit, learners should be given as much practical experience as possible. Delivery methods could include learner-centred tasks such as group work and research tasks or learner-led presentations.

Group discussions could be used to identify the benefits of being healthy at work. Personal experience could be referred to (for example a learner may be able to share how they felt when they experienced unemployment due to ill health).

Speakers from different areas of work could be invited to talk to the group on the importance of keeping healthy at work. This may include reference to the benefits that a healthy workforce has for a company or organisation.

When discussing illnesses and injuries at work, it is important to make this as relevant as possible for learners. If they have already been in work, they will be able to refer to their own experiences. However, this will be difficult for learners who have not had any work experience. One way to overcome this would be to refer to their classroom experiences or work at home. Topics such as repetitive strain injury, posture, colds and flu could then be discussed in this context.

Websites are a good source of information. Learners could be encouraged to use the internet to research repetitive strain injury, for example sites such as [www.patient.co.uk](http://www.patient.co.uk).

Learners could be asked to find out what causes RSI and how it could be prevented. Learners would not be expected to give detailed or lengthy information.

Learners should also be encouraged to think about how they can manage their health in different types of workplace environments, for example infection control is particularly important when working in a hospital, whilst wearing personal protective equipment (PPE) is essential when working on a building site. Learners could visit different work environments to find out about managing health in specific work areas or speakers could be invited to talk to the group.

Learners could ask friends or colleagues how they keep healthy. Learners could design a simple questionnaire and present the information gathered to the rest of the group. Alternatively, they could design posters on how to manage health at work and display them in the class or place of learning. This task could provide practice for Functional Skills if learners ensured that the information given was grammatically accurate and spelt correctly.

### Assessment

In order to achieve 1.1, learners must outline why it is important to be healthy at work. They should give at least three reasons which benefit themselves and the employer. This could be assessed through a one-to-one discussion with the tutor, recorded by the tutor for verification purposes. Alternatively, learners could produce a poster or leaflet to display their ideas.

To achieve 2.1, learners identify three different ways of keeping healthy at work. Learners could produce a leaflet or poster showing different ways of keeping healthy at work. Alternatively, they may participate in a discussion of how to keep healthy at work.

For 2.2, learners must identify at least two different types of working environments and at least one associated health risk or issue for each type.

## Suggested resources

### Websites

<a href="http://www.gov.uk/">www.gov.uk/</a>	Government website providing information
<a href="http://www.worksmart.org.uk/index.php">www.worksmart.org.uk/index.php</a>	A TUC run website with information about rights at work

# Unit 3: Preparing for Work Placement

**Unit reference number:** T/503/2821

**Level:** Entry 3

**Credit value:** 1

**Guided learning hours:** 10

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## Unit aim

The aim of this unit is to prepare learners for work placement by discussing the practical aspects as well as giving opportunities to discuss any fears and anxieties they may have and offer solutions.

## Unit introduction

Learners undertaking work placement have the opportunity to learn and develop the skills they need for the world of work. They need to be enthusiastic, hardworking and highly motivated. It is, therefore, essential that before undertaking any form of work placement, learners are well prepared. This unit introduces learners to the importance of knowing what will be expected of them during their work placement and what they can hope to achieve as a result of this experience.

Starting a work placement, particularly if it is a learner's first experience of the workplace, should be an exciting time for a learner. It could, however, also be an anxious time. The unit helps learners to identify possible factors that may cause anxiety or uncertainty and where to go for support.

Although the term 'company or organisation' has been used throughout this unit, it can refer to any type of work placement for which the learner may be preparing.

## Essential resources

In order to make this unit relevant, the learner must be preparing to go on a suitable work placement. Employers must also be prepared for the upcoming work placement and support the learner in gathering relevant information.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes		Assessment criteria		Unit amplification
1	Know where to plan to do work placement	1.1	Identify key information about where to plan to do work placement	<ul style="list-style-type: none"> <li>□ <i>Key information about work placement:</i> name of company or organisation; type of business or service; location; details of relevant contact person at company or organisation</li> </ul>
2	Know what is expected during the work placement	2.1	Identify different tasks likely to perform as part of the work placement	<ul style="list-style-type: none"> <li>□ <i>Work placement tasks:</i> tasks e.g. administrative, customer service, logistics</li> </ul>
		2.2	Identify appropriate behaviours and attitudes for the work placement	<ul style="list-style-type: none"> <li>□ <i>Appropriate behaviours:</i> behaviours e.g. being punctual, being reliable in carrying out tasks, showing tolerance and respect for others</li> <li>□ <i>Appropriate attitudes:</i> attitudes e.g. motivated, enthusiastic, willing to learn, flexible, accommodating, cheerful</li> </ul>
3	Know appropriate sources of support for dealing with anxiety or uncertainty during the work placement	3.1	Identify factors which may cause anxiety or uncertainty during a work placement	<ul style="list-style-type: none"> <li>□ <i>Factors:</i> personal, e.g. transport arrangements, financial issues, childcare arrangements; work-related, e.g. strained relationships with colleagues, asked to complete inappropriate or confusing tasks, unclear instructions given</li> </ul>
		3.2	Identify appropriate sources of support they could use in situations of anxiety or uncertainty during the work placement	<ul style="list-style-type: none"> <li>□ <i>Appropriate sources of support in situations of anxiety or uncertainty:</i> e.g. work placement supervisor or personal mentor assigned for the work placement, team leader, work placement coordinator, work placement notes, training guide, instruction manual</li> </ul>
4	Be able to set goals for the work placement	4.1	Set appropriate goals for the work placement	<ul style="list-style-type: none"> <li>□ <i>Appropriate goals:</i> personal targets, e.g. arrive on time, attend each day, dress appropriately; work-related targets, e.g. learn a new skill, follow instructions, find out about the job role, ask appropriate questions if something is unclear</li> </ul>

## Information for tutors

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### Delivery

Although each learner will be attending a different work setting, the principles behind preparing for the work placement will be the same. Learners need to find out information about where they are planning to do their work placement. Where possible, learners should be encouraged to do this on their own, although they may need tutor support. Documents provided by the company or organisation, their website or arranging for a representative from the organisation to speak with the learner could all be valuable sources of information. The information gathered by the learner should be relevant and straightforward for example: What is the name of the company or organisation? What does the company or organisation do? Who will I be reporting to? What is the physical location of the work placement?

To help learners understand the types of tasks they may be involved in, it may be useful to invite learners who have already completed a work placement with the same company or organisation (or with a similar type of company or organisation) to speak to the current group of learners. Alternatively, a past or present employee may be able to provide appropriate information. If neither of these sources are available, the tutor could provide simple job descriptions for similar positions to help learners identify the types of tasks they may undertake.

Learners need to be aware that their dress and body language during a work placement can communicate positive and negative attitudes. This could be illustrated through role-play situations. Appropriate attitudes and behaviours for the workplace could be discussed in small groups. Workplace scenes from television programmes, films or other video clips could be used as a starter for discussions.

Tutors could also provide lists of the possible attitudes and behaviours needed to satisfy the requirements of the work placement and employers could be invited as guest speakers to discuss expectations. Learners should be given the opportunity to discuss these attitudes and behaviours so that they can identify a range of possible goals to aim for in order to get the most out of their time on work placement.

Learners going into a work placement might feel nervous and concerned that they will appear incompetent or will not be able to carry out what they are asked to do. It would therefore be beneficial for learners to discuss possible causes of concern and to know the appropriate sources of support to help them deal with any feelings of stress or confusion during the work placement. For example, learners could watch a TV or film clip that depicts a stressful scene in the workplace, identify the possible problem, discuss what caused the problem and who the people in the clip could approach for help or what other sources of help might be available.

Alternatively, learners could discuss their own experiences, such as during previous work placements, part-time work roles or voluntary work. The discussion could include how the situation was resolved.

Learners might perceive setting goals as a complex task so it could be useful to introduce this topic by providing practical, familiar examples, such as making a list of what they want to do today. They could then return to their list the following day and find out if they managed to achieve it and, if not, why not. This could be used as an introduction to setting realistic, appropriate goals for their work placement.

Learners may wish to discuss possible work placement goals in group situations and/or individually with tutors or careers advisers.

## Assessment

To achieve 1.1, learners must identify basic information about the work placement to which they are going. The source of the information may be, for example, from documents provided by the tutor, from an informal interview with the work placement provider or from leaflets supplied by the work placement provider. Information identified by the learner should include the name of the organisation, what the organisation does, its location and who the learner's point of contact will be.

To achieve 2.1, learners must identify at least two different tasks that they may be expected to carry out when they are on work placement. They should be given information about the work placement from which they can identify the relevant tasks.

For 2.2, learners must identify at least two different behaviours and at least two different attitudes that would be expected for the work placement. A video clip or DVD of people in a work environment could be used as a source of evidence to allow learners to identify appropriate behaviours and attitudes. Alternatively, learners could produce a leaflet or poster to describe the behaviours and attitudes.

For 3.1, learners need to identify at least two different factors that may cause anxiety or uncertainty during the work placement. The factors identified could then be used as the starting point for 3.2, where learners have to identify a source of help for each factor. Alternatively, for 3.2, learners could identify at least two appropriate sources of help or support they could use if they found themselves in a situation of stress, uncertainty or difficulty during the work placement.

Criterion 4.1 requires learners to set at least one personal goal and one work-related goal. The goals must be appropriate and in keeping with the overall aims of the work placement. If this is carried out as part of a tutorial, evidence must be available for internal and external verification.

## Suggested resource

### Websites

<a href="http://www.projectsmart.co.uk/smart-goals.html">www.projectsmart.co.uk/smart-goals.html</a>	Project management resource giving advice on setting SMART goals
<a href="http://www.work-experience.org">www.work-experience.org</a>	National Council for Work Experience

# Unit 4: Learning from Work Placement

**Unit reference number:** A/503/2822

**Level:** Entry 3

**Credit value:** 2

**Guided learning hours:** 10

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## Unit aim

This unit has been designed to help learners reflect on the experience they have gained in the work placement and identify what they have learned.

## Unit introduction

Spending time in a work placement can be an extremely valuable experience. Learners have the opportunity to observe others at work, experience different job roles first hand, develop personal and work-related skills and gain an understanding of their own strengths and weaknesses. They will be encouraged to make basic judgements about their own performance and relate it to the goals that they will set for their future.

Before starting this unit, learners must have experienced a work placement and know that the information gathered from that experience will be used as a basis for this unit.

## Essential resources

The learner must attend a work placement prior to undertaking this unit.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to reflect on the experience of the work placement	1.1	List what went well during the work placement and why it went well	<ul style="list-style-type: none"> <li>□ <i>Reflect</i>: sources of feedback, e.g. tutor, supervisor or line manager, colleagues; gathering information, e.g. listing tasks undertaken, checklist of skills needed to do tasks</li> </ul>
		1.2	List what they could have done better during the work placement and how it could have been done better	
2	Know what has been learned from the work placement	2.1	Identify what was learned about the job role and the work placement	<ul style="list-style-type: none"> <li>□ <i>Job role</i>: specific tasks; working with others</li> <li>□ <i>The work placement</i>: purpose; size of company or organisation; organisational structure; their own role during the work placement</li> </ul>
		2.2	Identify what they learned about themselves during the work placement	<ul style="list-style-type: none"> <li>□ <i>Personal learning</i>: self-management, e.g. flexibility, time keeping, enthusiasm, punctuality; effectiveness in working with other people; skills to do a particular task; interests or talents, e.g. good at working with animals, interest in working with computers, enjoys talking to people on the telephone</li> </ul>
3	Be able to use learning from the work placement to set goals	3.1	With guidance, set realistic goals which build on learning from the work placement	<ul style="list-style-type: none"> <li>□ <i>Goals</i>: short-term; achievable; measurable; career plans; qualifications or study plans</li> </ul>

## Information for tutors

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### Delivery

In order to achieve this unit, learners must have had experience in a work placement. The length of time spent in the work placement is not defined. However, sufficient time must be given to allow learners to achieve the assessment criteria.

It may be beneficial for this unit to be delivered alongside a tutorial programme. This would ensure that, prior to experiencing a work placement, learners would know and understand what evidence they should gather. Ongoing one-to-one discussions throughout the work placement will also help learners understand the learning process and the importance of feedback. Learners may find it helpful to discuss their expectations of their work placement prior to attending. They could then use this information to discuss what they learned or perhaps did not learn.

As most of the evidence gained for this unit will be via a work placement and one-to-one discussions with tutors and/or line managers, it is unlikely that much time will be spent in a formal teaching situation. Learners should however be given guidance on how to gather information needed for the work placement evidence and on how to reflect on their work placement experience. Initially this could be done using familiar situations, such as reflecting on how easily they got their child ready for bed, how successful a shopping trip was. Simple questions could be asked for example: Was it successful? What went well? How do you know? What would you do differently next time? Why did it not go so well? Developing a simple checklist may also be a useful tool. Learners then assess their own abilities as they complete tasks.

Throughout their work experience, learners could be encouraged to gather information about their job role and their work placement. Evidence could include their induction pack, job descriptions, marketing leaflets about the work placement and descriptions of organisational structures. It is very important that learners understand the concept of confidentiality and ensure that any information used is approved by their supervisor or line manager.

### Assessment

In order to achieve this unit, learners must take part in work experience to gather the relevant information and demonstrate that they have achieved all the assessment criteria. Learners may demonstrate their competence by collating a portfolio of evidence for each assessment criterion. Learners could keep a record of activities at the placement which will help them in the review process with a tutor or careers adviser when they return to school or college. The record of activities could take the form of short answers to straightforward questions about the placement.

At a review meeting with a tutor after the work placement, learners should be able to identify what aspects of the work placement they did well and what they could have done better, giving examples. They may need some encouragement and prompting. This would provide evidence for 1.1 and 1.2. Learners need to list at least two activities that went well and at least two activities that were not so successful and give a reason for one of the successes and one of the activities that were not so successful.

For 2.1 and 2.2, learners must identify what they have learned about themselves, the company or organisation and the role they undertook at the placement, giving at least one example in each case. This could include identifying a talent, personal quality or interest recognised as a result of the placement, knowledge gained about the function of the company or organisation, learning a new skill by doing a task successfully or learning to use a particular tool or machine.

To achieve 3.1, learners must discuss with a tutor or careers adviser possible options in respect of future career plans following their learning experience at the placement and, with support, set realistic goals in areas such as courses, training programmes and further experience. Evidence of learners' goals may take the form of a log, presentation, poster, written statement provided by the learner (with supporting notes from the tutor) or another appropriate format.

### **Suggested resources**

#### **Websites**

[www.direct.gov.uk/en/EducationAndLearning/](http://www.direct.gov.uk/en/EducationAndLearning/) Advice on education and learning including options for 14-19 age group and adult learning

# **Unit 5: Working in Business and Administration**

**Unit reference number: H/600/1090**

**Level: Entry 3**

**Credit value: 2**

**Guided learning hours: 20**

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## **Unit aim**

The aim of this unit is for learners to develop the knowledge and skills needed to identify and complete routine tasks undertaken by administrators.

## **Unit introduction**

This unit aims to give learners an idea of what it is like to work in business administration. Learners will be introduced to a range of administrative tasks such as answering the telephone, welcoming visitors, producing documents and collating information.

When working in business administration it is important to be able to follow instructions, and to follow them accurately. In this unit learners will need to receive and follow instructions to complete a range of administrative tasks. They will develop an appreciation of the need to listen carefully to instructions and to check for understanding and clarification, where necessary, before carrying out the task accurately.

## **Essential resources**

Centres need access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know what activities are routinely undertaken by administrators	1.1	Identify routine administrative tasks	<ul style="list-style-type: none"> <li>□ <i>Administrative tasks</i>: answering the telephone; filing and retrieving documents; producing documents using IT, e.g. letters, invoices; photocopying and collating documents; collecting, sorting and distributing mail; preparing outgoing mail; receiving visitors</li> </ul>
2	Be able to follow instructions to carry out administrative tasks	2.1	Check understanding of instructions and ask for clarification where necessary	<ul style="list-style-type: none"> <li>□ <i>Following instructions</i>: type of task, e.g. photocopying papers, producing documents, collecting visitor from reception; timescales; listening, questioning when unsure, confirming understanding; who to inform once task is complete</li> </ul>
		2.2	Follow instructions to complete a limited range of administrative tasks accurately	<ul style="list-style-type: none"> <li>□ <i>Carrying out task</i>: following instructions; checking for accuracy, checking instructions have been followed correctly</li> </ul>

## Information for tutors

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### Delivery

The purpose of this unit is to give learners the opportunity to experience different administrative tasks within a real or simulated environment. The unit will encourage learners to think realistically about what it would be like to be employed in an administrative role. It focuses on the tasks learners could carry out on completing a qualification at this level.

A guest speaker could provide a useful input on the importance of following instructions accurately and using appropriate communication and language. If possible, learners could also visit an office to observe the types of tasks that are carried out. This could be the centre's own office if no other is available. Role-play activities may enable learners to practise listening to, checking understanding of and confirming instructions. Learners will need to listen to instructions and be guided when learning about the different administrative tasks. A practise office could be used when tutors are giving guidance and instructions about filing systems, sources of information and where stationery can be found. If this is not possible, an office within the centre could be used (although access to confidential files will need to be taken into account).

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
<p>Introduction to unit and structure of the programme of learning.</p> <p>Tutor-led discussion on the types of administrative activities that take place in an office.</p> <p>Speaker from organisation or centre to talk about the administrative tasks that routinely need to be carried out in their office.</p> <p>In small groups, learners visit an office to observe the main administrative activities such as communicating by telephone, producing documents using IT, distributing mail and receiving visitors.</p> <p>Assessment – in a one-to-one discussion with the tutor, learners must identify at least four routine administrative tasks (learning outcome 1).</p>
<p>Tutor-led discussion on the importance of listening to instructions and of checking for clarification.</p> <p>Role-play exercises – learners practise listening to instructions and checking for understanding.</p> <p>Exercises – learners practise carrying out a range of routine administrative tasks according to instructions given by the tutor. Learners practise asking questions to clarify the instructions.</p> <p>Assessment – learners to be observed carrying out at least four administrative tasks according to instructions given by the tutor. Learners must check the instructions with the tutor for clarification (learning outcome 2).</p>
<p>Assessment feedback, review and evaluation of unit.</p>

## Assessment

To meet 1.1, learners need to identify at least two administrative tasks that may be carried out in an office. This is likely to be evidenced by learners providing a written or oral list of the main administrative tasks, or learners could be given a pro forma to complete.

To meet 2.1 and 2.2, learners need to be observed listening to and checking understanding of instructions, and following the instructions to carry out at least two different administrative tasks such as filing or retrieving documents, or welcoming visitors. Evidence is likely to be through observation or witness testimonies or self-assessment checklists. Witness statements or observation records should be retained for verification purposes.

## Suggested resources

### Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)  
ISBN 9781846909214

### Website

[www.skillsca.org](http://www.skillsca.org) The Council for Administration

# **Unit 6: Professional Behaviour in an Office Environment**

**Unit reference number:** L/600/1097

**Level:** Entry 3

**Credit value:** 2

**Guided learning hours:** 20

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## **Unit aim**

The aim of this unit is for learners to develop appropriate behaviour when working in a office environment.

## **Unit introduction**

When working in an administrative role it is important to behave professionally and meet the expectations of employers, colleagues and customers. In this unit learners will develop their knowledge of how to behave appropriately in an office environment, including the appropriate types of communication and language needed to present themselves professionally in an administrative role.

Most people working in administration have some responsibility for confidential information, and for security of either information or property. Learners will learn about the importance of the rules of confidentiality and security which are important for many administrative roles.

## **Essential resources**

There are no essential resources for this unit. However, DVDs, videos and guest speakers can provide useful examples of how to behave professionally in an office.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to behave in an office environment	1.1	Communicate appropriately with colleagues	<ul style="list-style-type: none"> <li>□ <i>Behaviour</i>: being polite; tactful; not aggressive, e.g. when listening to instructions, asking and answering questions, giving relevant and appropriate answers to questions, listening and responding to feedback or requests</li> <li>□ <i>Communication</i>: verbal communication, e.g. one-to-one discussions with colleagues, small group discussions, taking or making telephone calls; written communication, e.g. notes, written messages, emails, letters; non-verbal communication, e.g. posture, eye contact; the need for clear, accurate communication</li> </ul>
		1.2	Use appropriate language for the workplace	<ul style="list-style-type: none"> <li>□ <i>Language</i>: using informal language, e.g. in workplace discussions with colleagues, chatting with work-mates, emails to colleagues or workmates; using formal language, e.g. with senior managers, customers, in meetings; using polite, courteous language; avoiding inappropriate or offensive language, e.g. slang, swearing</li> </ul>
2	Know about the rules that organisations have relating to confidentiality and security	2.1	Give examples of rules that relate to confidentiality and security	<ul style="list-style-type: none"> <li>□ <i>Confidentiality</i>: types of confidential information, e.g. employee personal contact details, payment details, customer personal contact and payment details, company-sensitive information, overheard conversations; rules relating to confidential information, e.g. not opening envelopes labelled 'confidential', not giving personal contact details over the telephone, not giving out customer information without checking first</li> <li>□ <i>Security</i>: security of information, e.g. ensuring employee or customer details are stored securely, rules regarding who is permitted to have access to confidential and company-sensitive information; security of property, e.g. ensuring all employees wear a security pass, ensuring all visitors sign in and have a badge</li> </ul>

## Information for tutors

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### Delivery

This unit may be delivered in the workplace, as part of a work placement or volunteering commitment or in the centre. For learning outcome 1, learners would benefit from the opportunity to take part in a wide range of different exchanges, from chatting with colleagues during breaks to making phone calls to taking part in a formal meeting.

Learners could be given familiar scenarios to encourage one-to-one discussions. Employers could be invited to discuss the importance of communication in the context of administrative roles. These could include people in different administrative roles where, for example the type of communication may vary in a call centre, a receptionist or team administrator. During the discussions and exchanges it may be appropriate to encourage informal peer assessment.

Learners should be encouraged to think about the type of language they use, their body language and their tone of voice. Learners could also be encouraged to think about how they can show courtesy, or politeness, to others in the workplace. This may help to raise awareness that communication with employers, managers and customers tends to be more formal than that with peers or colleagues.

Learners may find it helpful to watch clips from videos or popular television programmes to help them understand communication techniques and the use of formal and informal language. It may be helpful for tutors to provide examples of notes, emails and letters which demonstrate formal and informal language in a written context.

Learners should know the rules relating to confidentiality and security, for example not to repeat personal information, not to give out private details over the phone, and the need to save confidential information securely. Learners could be encouraged to think of some details about themselves that they would not wish others to know and to reflect on how they would feel if they were to be made public.

A knowledge of legislation is not required for this unit.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
Introduction to unit and structure of the programme of learning. Tutor-led delivery on different types of communication. In small groups learners to thought scatter all the types of communication they might use in an office and then feed back to the group in a wider discussion.
Tutor-led delivery on the type of behaviour expected in an office environment. Learners to watch DVDs giving examples of appropriate and inappropriate types of communication and behaviour in an office.
Guest speaker to talk about the type of behaviour expected in their office, or learners visit an office to observe behaviour.

## Topic and suggested assignments/activities (continued)

Tutor to provide examples of notes, emails and letters showing formal and informal language.

Role-play exercises – learners practise communicating with peers in a number of scenarios provided by the tutor.

Assessment – learners to be observed either in role-play situations, a work placement or model office communicating appropriately with colleagues and using appropriate language. Tutors must keep an observation record or assessment checklist (learning outcome 1).

Tutor-led discussion

- What is confidentiality?
- What type of information is confidential?
- What rules would relate to confidential information?

Learners to think of some information about themselves they would prefer others not to know – how would they feel if this were made public?

- How can confidential information be kept secure?
- What other rules are there that relate to security?

Guest speaker from an office to talk about the types of confidential information they deal with and the rules in place relating to confidential information.

Learners complete a chart of types of information and indicate which would be confidential.

Assessment – one-to-one discussion with the tutor. Learners must show they know at least one rule relating to confidentiality and one rule relating to security. A tutor observation record must be kept of the discussion (learning outcome 2).

Assessment feedback, review and evaluation of unit.

## Assessment

Learners can be assessed during a work placement with employers or with colleagues or in a model office in the centre. If neither of these are possible, simulated situations are acceptable where learners deal with topics relevant to an administrative role.

Assessment criteria 1.1 and 1.2 require learners to demonstrate appropriate communication and the use of appropriate language with colleagues. Learners should demonstrate at least two types of behaviour, for example informally discussing work or more formally in a meeting. A witness statement or assessment checklist should be used to record competence.

For 2.1 learners must give examples of rules relating to confidentiality and security. At least two rules should be given, one relating to confidentiality and one relating to security. This criterion can be evidenced through a one-to-one discussion or question and answer session with the tutor (with witness statement or observation record), or through the completion of a worksheet or proforma.

Witness statements and observation records must be retained for verification purposes.

## Suggested resources

### Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

### Websites

[www.skillsca.org](http://www.skillsca.org)

The Council for Administration

[www.chalkface.com](http://www.chalkface.com)

Worksheets on practical communication skills in the workplace

# **Unit 7: Using Office Equipment in a Business Environment**

**Unit reference number:** R/600/1098

**Level:** Entry 3

**Credit value:** 3

**Guided learning hours:** 30

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## **Unit aim**

The aim of this unit is for learners to develop the knowledge and skills to use office equipment in a business environment.

## **Unit introduction**

All administrative roles need office equipment to carry out tasks such as producing documents, storing information and taking calls, and it is essential to understand the purpose of office equipment and how to use it safely and efficiently.

In this unit learners will develop their knowledge of the different types of office equipment that are available and how to use the equipment to carry out administrative tasks. Learners will also develop their understanding of how to use equipment safely and efficiently. The types of equipment used will reflect a typical modern workplace and are likely to include the telephone, fax machine, franking machine, photocopier and scanner.

## **Essential resources**

Centres need to have access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know what equipment and resources are needed to carry out a range of routine office tasks	1.1	Select the correct equipment and/or resources from a given range	<ul style="list-style-type: none"> <li>□ <i>Equipment</i>: electronic, e.g. computer, photocopier, scanner, printer, shredder, fax machine, telephone equipment, calculator, data projector, franking machine; manual, e.g. binder, guillotine</li> <li>□ <i>Resources</i>: types of resource, e.g. paper, toner, binders; operator manuals, user instructions</li> <li>□ <i>Routine office tasks</i>: types of task, e.g. printing, photocopying, collating, storing, scanning, faxing documents, franking post, making and taking telephone calls</li> </ul>
2	Be able to use key equipment under supervision	2.1	Use key equipment under supervision and following given instructions relating to: <ul style="list-style-type: none"> <li>• functional requirements</li> <li>• health and safety</li> <li>• environmental sustainability</li> </ul>	<ul style="list-style-type: none"> <li>□ <i>Following instructions</i>: listening; checking when unsure; asking questions to clarify understanding; checking instructions have been carried out correctly</li> <li>□ <i>Functional requirements</i>: types of requirement, e.g. ensuring equipment connected correctly and turned on, ensuring there is enough paper or toner in the photocopier or printer, following operator's manual or user's instructions</li> <li>□ <i>Health and safety</i>: proper use of equipment; seating; posture; lifting; identification of hazards</li> <li>□ <i>Environmental sustainability</i>: ways of minimising waste, e.g. copying back to back, copying with facing pages, recycling paper and toner, saving binders for reuse</li> </ul>

## Information for tutors

### Delivery

The purpose of this unit is to give learners the opportunity to use different types of equipment to carry out administrative tasks in an office environment. The unit should focus on tasks learners could carry out on completing a qualification at this level.

There are many different types of office equipment, and only examples are given. Standard equipment, for example, a photocopier will be supplemented by more specialised equipment such as scanners and data projectors. Learners will need to be introduced to the types of equipment, learn how to use them, and understand the importance of following safety procedures and manufacturers' instructions so that they do not injure themselves or damage the equipment.

Learners should be aware of the problems they are likely to experience with the equipment and how they should be dealt with. Visits to an administrative office, such as the centre's own or that of a local business, would help learners investigate how the work area is organised and the types of equipment used to support office activities.

Learners should be aware of how to avoid waste when using office equipment, such as copying documents back to back to save paper and using recycling bins.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion – what type of work takes place in an office? What type of equipment is needed to carry out this work?

Learners to create a poster, or a complete worksheet, showing different office tasks and the different equipment needed to complete them.

Tutor-led discussion – what needs to be checked before using the equipment?

Learners to begin compiling a checklist including:

- what needs to be checked before using the equipment to ensure it works
- how to use the equipment safely
- how to minimise waste while using the equipment.

Tutor demonstrates using different types of office equipment.

Learners to practise carrying out different tasks using office equipment.

Assessment - tutors to give learners instructions for carrying out at least three different routine administrative tasks.

Learners must select the correct equipment and resources to carry out the task (learning outcome 1).

Learners must then be observed carrying out the tasks using equipment. Learners must show they have paid attention to checking that the equipment is able to function, health and safety requirements and minimising waste while using the equipment. Learners may use their checklist for this purpose (learning outcome 2).

Assessment feedback, review and evaluation of unit.

## Assessment

To achieve 1.1, assessment criterion learners must select the correct equipment and resource from a range provided by the tutor, and carry out at least two different routine office tasks, also provided by the tutor. This can be evidenced through a verbal discussion or a question and answer session, or through the completion of a pro forma.

To achieve 2.1, learners must follow instructions to use the equipment in order to carry out the two tasks given for 1.1. Learners must be observed showing an awareness of the functional requirements of the equipment (for example checking a photocopier has enough paper and that this is loaded correctly), health and safety (for example paying attention to posture, ensuring there are no hazards), and sustainability (for example copying back to back).

## Suggested resources

### Books

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

### Websites

<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive - information on health and safety in the workplace
<a href="http://www.skillsca.org">www.skillsca.org</a>	The Council for Administration



# Unit 8: Using a Computer in Business Administration

**Unit reference number:** M/501/7234

**Level:** Entry 3

**Credit value:** 3

**Guided learning hours:** 30

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## Unit aim

This unit will introduce learners to the main administrative tasks carried out on the computer: producing documents and sending and replying to emails. Learners will learn to use the basic functions of a computer and to understand its operating system in an administrative context. Learners will develop an understanding of the IT desktop environment and will have the opportunity to learn how to create and save simple business documents and how to create, send and reply to business emails.

## Unit introduction

Most people working in a business administration environment must be able to use a computer. This unit will introduce learners to the main administrative tasks carried out on the computer: producing documents and sending and replying to emails.

In this unit learners will learn how to use the basic functions of a computer and to understand its operating system in an administrative context. Learners will develop an understanding of the IT desktop environment and have the opportunity to create and save simple business documents and to create and send a business email.

## Essential resources

The most significant resource for this unit would be contact with organisations that use IT and/or need to employ IT professionals in a variety of administrative roles. Both would offer a perspective on the nature of work in the business administration sector. The learner could have contact with a range of such organisations. Visits to, or representatives from, these organisations will be valuable for learners.

Care should be taken over appropriate support reading or internet materials. They need to be focused on the work of the unit and at an appropriate level for development of the learner. Internet and library information is useful but care should be taken that information is current.

Suggested reading should reflect the focus of the learner group and support developing understanding and practice related to the group's study area.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to log on to the computer	1.1	Demonstrate logging on to the computer	<ul style="list-style-type: none"> <li>□ <i>Key tasks</i>: starting up; shut down; reboot; logging on; passwords; keep self safe while using computer</li> <li>□ <i>Desktop and desktop configuration</i>: start menu; taskbar; clock; control panel; screen settings, e.g. colour scheme; screensaver options; setting date and time</li> <li>□ <i>Text/dialogue boxes</i>: open; close; move; re-size; select from drop-down lists</li> </ul>
2	Be able to create and save a business document	2.1	Create a business document using a computer by: <ul style="list-style-type: none"> <li>• planning, drafting, organising and sequencing writing</li> <li>• writing logically and clearly</li> <li>• using spell check</li> </ul>	<ul style="list-style-type: none"> <li>□ <i>Types of business documents</i>: letters; memos; agendas; notices; purpose – to give information; to request information; to confirm arrangements</li> <li>□ <i>Document layout</i>: structure; style; layout</li> <li>□ <i>File functions</i>: creating; opening; saving; naming; printing; filing</li> <li>□ <i>Editing</i>: inserting; deleting; cutting; copying; pasting; spell/grammar check; undo; redo</li> </ul>
		2.2	Print the business document	

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to create and send a business email	3.1	Create a business email by: <ul style="list-style-type: none"> <li>• planning, drafting, organising and sequencing writing</li> <li>• writing logically and clearly</li> <li>• using spell check</li> </ul>	<ul style="list-style-type: none"> <li>□ <i>Purpose of emails</i>: to communicate; to give information, to request information, to confirm arrangements</li> <li>□ <i>Emails</i>: creating; checking clarity, appropriateness of language, grammar and spelling; sending; receiving; replying; saving</li> </ul>
		3.2	Send the email	
		3.3	Save the email	

## Information for tutors

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### Delivery

This unit is designed for learners who have never used ICT or who have little experience of using ICT in an administrative environment.

Learners will need to work in a suitable environment that offers opportunities for them to practise computer skills relevant to a junior business administration role. Learners will need to cover all practice activities in the unit content. Records of achievement will be needed. This will be an integral part of the required evidence and tutor observation sheets will outline achievements and levels of ability.

This unit supports the development of skills related to a chosen role, which could be explored and developed in work teams. Alternatively, specific skills can be approached and developed individually. The learner needs to be able to recognise their individual starting point in the skill development process and to recognise the improvements they make during the unit. The tutor may need to use a series of small 'signposts' to recognise the learner's work and its development.

This is essentially a practical unit and a set of activities based around a realistic scenario will benefit learners. Activities can focus on the needs of a user logging onto their PC, creating and saving documents and creating and sending emails. A presentation for the user could then take place in order to familiarise them with the desktop settings.

Learners may have their own email accounts set up by the centre as part of their user account profile. They could set up a third party email account using a web-based browser (for example Hotmail).

The business document and emails should be completed in line with the Entry 3 Level Functional Skills in writing, with appropriate language and correct spelling and grammar. Learners need to become used to checking their own work for grammar, punctuation and spelling, and could complete activities identifying errors and correcting them. They could also check each others' work.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
(Tutor to organise login and passwords in advance). Introduction to unit and structure of the programme of learning. Activities – learners to undertake a range of tasks to practise logging on to the computer and identify different desktop configuration and text/dialogue boxes. Assessment – learner to demonstrate logging on to the computer, following given tasks. Tutor to assess against a checklist for feedback (learning outcome 1).
Tutor-led discussion of a range of documents used in business including business layout, and the need to plan documents in advance. Tutor to demonstrate creating a business document. Practical – learners practise creating and saving short documents using a template, and check their own work for clarity of language and spelling errors.

## Topic and suggested assignments/activities (continued)

Assessment – each learner to create a business document demonstrating:

- planning, drafting, organising and sequencing of writing
- writing logically and clearly [Functional Skills, Entry 3: Writing]
- use of spell check.

Learners should then print out the document for assessment evidence (learning outcome 2).

(Tutor to set up individual email accounts for learners in advance).

Tutor-led demonstration on setting up and sending and saving emails, including the importance of planning, drafting and checking emails for clarity and spelling errors, following correct protocols when saving and saving to correct file.

Practical activity – learners to practise sending emails, for example from the library or home computer to a business requesting information (this could be the college if appropriate).

Practical activity – learners to undertake role-play scenarios sending, receiving and saving business emails, either to each other or to the tutor. They should then print and proofread each other's work.

Assessment – learners to create a business email and send it to the tutor. There must be evidence of:

- planning, drafting, organising and sequencing of writing
- writing logically and clearly [Functional Skills, Entry 3: Writing]
- use of spell check.

The tutor will then send the email back to the learners for them to save.

Assessment feedback, review and evaluation of the unit.

## Assessment

This is essentially a practical unit and the methods of assessment used should take this into account. Assessment would normally be a collection of tasks that ensure the assessment criteria are covered. Most of the assessment criteria can be confirmed by tutor observation and printouts.

To achieve the assessment criteria, learners will need to understand the fundamentals of logging on to a computer, creating and saving documents and creating, sending and replying to emails while working in a safe and responsible way.

To achieve 1.1, learners will need to be observed logging on to a computer according to procedures.

To achieve 2.1 and 2.2, learners need to create and save a short business document, for example a short letter confirming attendance at a conference, or a simple agenda with five items. The document should follow a recognised format (such as a short letter, agenda or notice). Learners could be given a pro-forma or template to copy/use. Learners will need to be observed using simple editing techniques such as deleting, cutting and pasting. Learners should demonstrate that they have followed the correct procedures in saving the document including naming protocols, saving to the correct files.

To achieve 3.1, 3.2, and 3.3, learners will need to create and save a short email (for example it could be agreeing to, or confirming, meeting arrangements). Learners will need to send the email, for example to one of their peer's college accounts or to their tutor's account. This email should then be returned to them. Learners should demonstrate that they have followed the correct procedures in saving the email including naming protocols, saving to the correct files.

### **Suggested resources**

#### **Books**

Hool G and Smith C – *the Really, Really, Really Easy Computer Book for Absolute Beginners of All Ages* (Struik Lifestyle, 2010) ISBN 9781770079038

MacRae K – *Using your Computer: The Beginners' Guide* (J H Haynes & Co Ltd, 2011) ISBN 9780857331205

*Microsoft Word for Beginners: Microsoft Word 2007* (2008) ISBN 9781933404493

*Microsoft Word: An Introduction to Word Processing Office 2007* (For Beginners) (2008) ISBN 9781933404622

Holden S and Francis M – *The Beginners' Guide to Windows 7* (Summersdale, 2011) ISBN 9781849531085

#### **CD ROM**

*Getting Started on your PC Deluxe* (Focus Multimedia Ltd)

#### **Websites**

[www.microsoft.com/atwork/  
getworkdone](http://www.microsoft.com/atwork/getworkdone)

Microsoft advice on how to construct  
written documents

[www.skillsca.org](http://www.skillsca.org)

The Council for Administration

# **Unit 9: Managing Own Learning**

<b>Unit reference number:</b>	<b>T/501/7235</b>
<b>Level:</b>	<b>BTEC Entry 3</b>
<b>Credit value:</b>	<b>3</b>
<b>Guided learning hours:</b>	<b>30</b>

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## **Unit aim**

In this unit learners will discuss their own work skills in order to develop a realistic personal development plan. Learners will reflect on their own skills in order to identify areas for development, and they will identify sources of help and advice. They will then prepare a personal development plan with realistic targets.

## **Unit introduction**

In order to progress within the work environment, a learner must be able to identify what skills they have already acquired that are relevant to employment and what skills need to be developed. Learners will need to identify sources of help and advice to support the development of skills not acquired. This may include talking to employees within the business environment or researching relevant websites. Using the information gathered from the research undertaken learners will then be able to develop a personal development plan. It is anticipated that learners will need guidance to achieve this outcome successfully.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to identify own work skills	1.1	Carry out a self-assessment of own work skills	<ul style="list-style-type: none"> <li>□ <i>Skills check</i>: self-assessment; awareness of life skills, e.g. organising activities for friends, family; awareness of interpersonal and communication skills; identifying strengths and weaknesses; importance of learning from mistakes; identifying skills gaps; feedback from others</li> </ul>
2	Be able to identify areas for development	2.1	Identify areas for development	<ul style="list-style-type: none"> <li>□ <i>Development opportunities</i>: work-based training; college-based training; on the job training; work shadowing; mentoring; own research; taking on new challenges</li> </ul>
		2.2	List sources of help and advice	<ul style="list-style-type: none"> <li>□ <i>Sources of help and advice</i>: in college – tutor, careers adviser; in work – supervisor, human resources adviser, colleagues; Learndirect</li> </ul>
3	Be able to prepare a realistic personal development plan	3.1	With guidance, prepare a personal development plan	<ul style="list-style-type: none"> <li>□ <i>Planning work</i>: work plans – discussing with supervisor/tutor, agreeing and amending, objectives, deadlines, timescales, prioritising, need for flexibility; revising plans – preventing problems, informing others of progress</li> <li>□ <i>Setting targets</i>: identifying targets, timeframe, priorities, standards, opportunities, training needed; how to measure achievement</li> <li>□ <i>Preparing personal development plan</i>: skills, knowledge and abilities; personal strengths and weaknesses; action points, completion times, extra information/training/resources required; checking progress</li> </ul>



## Information for tutors

### Delivery

This unit may build on work that the learner has already carried out on records of achievement or during job interviews. However, the unit should be taught in the context of the vocational sector being studied, so that learners can explore their potential in the sector. Alternatively, if this unit is used for induction purposes, or as a taster, a number of sectors could be explored.

A key aim of this unit is to match individual strengths to sector-specific job, roles and/or ambitions. Learners should be encouraged to identify any administrative skills they already have. Any prior experience or knowledge of different types of administrative roles would be useful for learners to share with each other. The internet will also be a great source of information about careers and skills focus, but should be used carefully.

Although this unit is designed to allow learners freedom of choice it should be remembered that a key outcome is to reflect on personal strengths and weaknesses related to the business administration sector.

Learners could access careers advice from Learndirect ([www.learndirect.co.uk](http://www.learndirect.co.uk)) to help them begin their personal development plan. Understanding the need for goal setting and the difference between medium-term and short-term goals could be explored through a question and answer session.

Learners at this level may need support in identifying and setting targets for themselves for learning outcome 3. This may be achieved through one-to-one discussions or tutorial.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Activity – tutor to provide learners with a list of work skills. Learners to identify their own skills from the list.

Tutor-led discussion on skills needed to work in business administration.

In pairs or small groups, learners to discuss and identify own areas of strengths and weaknesses.

Assessment – each learner to have a one-to-one discussion with the tutor to agree their self-assessment of own work skills (learning outcome 1).

Activity – learners to prepare folder template for plan for starting work.

Activity – learners to prepare questions for careers adviser (or to complete careers adviser interview form).

Assessment – learners to visit careers adviser to discuss their areas for development.

Group research – other sources of help and advice, e.g. using the internet to research suitable websites.

Assessment – learners to provide information from sources of help and advice researched, e.g. downloads of websites, leaflets, with a checklist of the type of advice given (learning outcome 2).

### Topic and suggested assignments/activities (continued)

Learners to have one-to-one discussion with the tutor to discuss goal setting and setting individual targets.

Learners to prepare a personal development plan. The plan must include one medium-term and two short-term goals.

Learners to have second one-to-one discussion with the tutor to agree the plan.

Assessment – learners to make final changes to the plan, as agreed with the tutor, and to print final copy (learning outcome 3).

Assessment feedback, review and evaluation of unit.

### Assessment

The assessment criteria for this unit may be combined into one assignment task as a personal development plan for the learner. This may take the form of a loose-leaf folder.

1.1 could be met through group discussions or one-to-one discussions with the tutor in order for learners to identify their own work skills.

To meet 2.1 and 2.2, learners will need to provide evidence of their research into their own areas for development. This may be supplemented with leaflets, downloads from websites, documentation from tutorials/discussions with tutors or careers advisers.

To meet 3.1, learners should prepare a personal development plan. Learners need to discuss their plan and receive guidance. This should preferably be with a careers professional such as a careers adviser, although if this is impractical, one-to-one discussion with the learner's tutor is acceptable. The plan should identify one medium-term and two short-term goals. These goals should be realistic.

### Suggested resources

#### Websites

[www.skillsca.org](http://www.skillsca.org)

Council for Administration

[www.direct.gov.uk/en/youngpeople/index.htm](http://www.direct.gov.uk/en/youngpeople/index.htm)

Advice for 13-19 age group, including advice on learning and careers

[www.learndirect.co.uk](http://www.learndirect.co.uk)

Advice on careers and skills development

# Unit 10: Using Email

**Unit reference number:** J/502/0172

**Level:** Entry 3

**Credit value:** 1

**Guided learning hours:** 10

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## Unit aim

This unit aims to enable learners to make the best use of email software to safely and securely send, receive and store messages.

## Unit introduction

This unit introduces electronic mailing (email) and its range of uses. Email is a modern communication method used on computer networks or wherever there is access to the internet. It is an immediate communication method and can be used at any time of the day or night. It is cost effective for both users with broadband and businesses. Email systems use either software applications, such as Microsoft Outlook, or website email application software that can be accessed through websites.

The first part of the unit deals with how to compose and send email messages, focusing on how to stay safe and respect others, following guidelines and procedures. Learners will also send a file as an attachment to an email message.

The second part of the unit aims to develop learners' knowledge and skills in managing incoming email messages by reading and responding to them and understanding how to use basic tools to store them for future use.

The final part of the unit will introduce learners to common email problems and how to respond to them, as well as identifying where to get expert advice to solve a problem.

## Essential resources

To deliver this unit centres will need to have a LAN with email application software or access to web-based emailing software and access to the internet. Centres will need the facilities to enable learners to carry out the practical aspects of the unit as defined by the content and assessment criteria. Centres will also need a range of suitable software tools and equipment to support the cohort size undertaking the units.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Use email software tools to send and compose messages	1.1	Use software tools to compose email messages	□ <i>Compose email messages:</i> compose, e.g. enter text
		1.2	Attach a file to an email message	□ <i>Adding an attachment:</i> attach, e.g. file
		1.3	Send and receive email messages using appropriate tools	□ <i>Send and receive email messages:</i> send, e.g. to, from, cc, subject; reply; receive, e.g. check mail, new messages, subject header
		1.4	Identify how to stay safe and respect others when using email	□ <i>Staying safe and respect others:</i> e.g. private information, language
2	Manage incoming email	2.1	Follow guidelines and procedures for using email	□ <i>Guidelines and procedures for using email:</i> set by employer or organisation, e.g. security, copyright, password protection
		2.2	Identify when to respond to email messages	□ <i>Responding to email:</i> priorities; information to send; who to send it to
		2.3	Read and respond to email messages	
		2.4	Store email messages appropriately for future use	□ <i>Store email:</i> e.g. personal folders, save drafts
3	Respond to common problems when using email	3.1	Respond to common email problems	□ <i>Email problems:</i> full mailbox; unknown sources, e.g. spam, junk, chain-mails, 'phishing' viruses; rejected email messages
		3.2	Identify where to get expert advice to solve a problem	□ <i>Expert advice:</i> e.g. help menus, guidelines, websites, email responses

## Information for tutors

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### Delivery

A practical approach to delivery is essential for this unit and should enable learners to develop their technical knowledge and skills. Much of the assessment evidence is likely to be produced during this process, and centres should consider what other supporting product evidence can be collected.

### Assessment

Where possible a holistic approach to teaching is suggested throughout this qualification. However, this unit is task based and could prove difficult to achieve over one set context. It is envisaged that this unit be taught through various topic areas of interest to the learners.

Therefore, assessment evidence will primarily come in the form of observations although class discussions, peer assessment and other written work may be effective. It is advised that a log of evidence recorded against each assessment criterion is kept by the learners.

To achieve a pass grade in this unit, learners will need to meet all of the assessment criteria.

### Suggested resource materials

#### Books

Dyszel B – *Outlook 2007 for Dummies* (John Wiley & Sons, 2006)  
ISBN 978-0470038307

Preppernau J and Cox J – *Microsoft® Office Outlook® 2007 Step by Step*  
(Microsoft Press, 2007) ISBN 978-0735623002

#### Websites

[www.bbc.co.uk/schools/teachers/](http://www.bbc.co.uk/schools/teachers/)

[www.howstuffworks.com](http://www.howstuffworks.com)

# **Unit 11: IT User Fundamentals**

**Unit reference number: T/502/0166**

**Level: Entry 3**

**Credit value: 2**

**Guided learning hours: 15**

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## **Unit aim**

This unit will introduce learners to the main administrative tasks carried out on the computer: producing documents and sending and replying to emails. Learners will learn to use the basic functions of a computer and to understand its operating system in an administrative context. Learners will develop an understanding of the IT desktop environment and will have the opportunity to learn how to create and save simple business documents and how to create, send and reply to business emails.

This unit aims to provide learners with a basic understanding of computers and aspects of security.

In this era of technology, most of us know how to use a computer to carry out our own tasks, but what about setting up a computer system for someone else? Understanding that individuals are not the same in their abilities and needs is important for anyone entering the workplace. This unit looks at the range of IT systems that enables different set-ups for different user needs.

Users will want to keep data safe and be able to access it quickly and easily. File management helps users to do this and is an integral part of running an efficient computer system. Part of this unit is concerned with using different storage media.

Once stored, data needs to be kept safe from unauthorised users and safe from corruption. Information security and integrity are central to any organisation. There are regular media reports about lost data files, hackers and viruses. In this unit these issues are considered as well as how to implement security features.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes		Assessment criteria		Unit amplification
1	Interact with and use IT system to meet needs	1.1	Use correct procedures to start and shut down an IT system	<ul style="list-style-type: none"> <li>□ <i>Start and shut down procedures:</i> log in; enter password; log out; shut down menu; lock, unlock</li> </ul>
		1.2	Use IT systems and interface features effectively to meet needs	<ul style="list-style-type: none"> <li>□ <i>Interface features:</i> e.g. desktop, window, dialogue box, menu, sub-menu, toolbar, icon, scrollbar, button, drag and drop, zoom, minimise, maximise</li> </ul>
		1.3	Use appropriate terminology when describing IT systems	<ul style="list-style-type: none"> <li>□ <i>IT systems:</i> will vary according to the set-up, e.g. computer, e.g. PC, laptop; input device, e.g. keyboard, mouse or other pointing device; processor; output device, e.g. screen, printer; storage media e.g. memory, disk, CD, DVD, data/memory (USB) stick, hard drive, network drive</li> </ul>
2	Organise, store and retrieve appropriately	2.1	Work with files and folders so that it is easy to find and retrieve information	<ul style="list-style-type: none"> <li>□ <i>File and folder handling:</i> create, name, open, save, save as files; move, copy, rename, delete files; display file lists, sort, search; create and name folders and subfolders</li> </ul>
		2.2	Identify types of storage media that can be used to store information	<ul style="list-style-type: none"> <li>□ <i>Storage media:</i> disk, CD, DVD, data/memory (USB) stick, media card, hard drives, network drives, mobile device</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Understand the need for safety and security practices	3.1	Follow guidelines and procedures for the safe and secure use of IT	<ul style="list-style-type: none"> <li>□ <i>Staying safe</i>: protect personal information, avoid misuse of images, use appropriate language, respect confidentiality, use copy lists with discrimination</li> <li>□ <i>Guidelines and procedures</i>: set by employer or organisation, e.g. health and safety, security, copyright, netiquette, data protection</li> <li>□ <i>Information security</i>: username and password/PIN selection, online identity/profile; real name, pseudonym, avatar; what personal information to include, who can see the information; withhold personal information</li> </ul>
		3.2	Understand the need to keep information secure	
		3.3	Keep information secure and manage access to information sources securely	
		3.4	Identify why it is important to control access to hardware, software and data	
4	Maintain system and respond to common IT system problems	4.1	Respond to IT problems and take appropriate action	<ul style="list-style-type: none"> <li>□ <i>IT problems</i>: program not responding, error dialogue, storage full, paper jam and find solutions to these problems</li> <li>□ <i>Expert advice</i>: limits of own understanding and skills, help menus, manufacturer's guidelines, how to follow advice</li> </ul>
		4.2	Identify where to get expert advice and help to solve problems	



## Information for tutors

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### Delivery

A practical approach to delivery is essential for this unit and should enable learners to develop their technical knowledge and skills. Much of the assessment evidence is likely to be produced during this process, and centres should consider what other supporting product evidence can be collected.

### Assessment

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests, or a mixture of both, to demonstrate competence

Where possible an holistic approach to teaching is suggested throughout this qualification. However, this unit is task based and could prove difficult to achieve over one set context. It is envisaged that this unit be taught through various topic areas of interest to the learners.

Therefore, assessment evidence will primarily come in the form of observations although class discussions, peer assessment and other written work may be effective. It is advised that a log of evidence recorded against each assessment criterion is kept by the learners.

To achieve a pass grade in this unit, learners will need to meet all of the assessment criteria.

### Suggested resources

#### Books

Hool G and Smith C – *the Really, Really, Really Easy Computer Book for Absolute Beginners of All Ages* (Struik Lifestyle, 2010) ISBN 9781770079038

Holden S and Francis M – *The Beginners' Guide to Windows 7* (Summersdale, 2011) ISBN 9781849531085

MacRae K – *Using your Computer: The Beginners' Guide* (J H Haynes & Co Ltd, 2011) ISBN 9780857331205

*Microsoft Word for Beginners: Microsoft Word 2007* (2008) ISBN 9781933404493

*Microsoft Word: An Introduction to Word Processing Office 2007 (For Beginners)* (2008) ISBN 9781933404622

#### CD ROM

*Getting Started on your PC Deluxe* (Focus Multimedia Ltd)

#### Websites

[www.microsoft.com/atwork/  
getworkdone](http://www.microsoft.com/atwork/getworkdone)

[www.skillsca.org](http://www.skillsca.org)

Microsoft advice on  
how to construct written documents

The Council for Administration

# **Unit 12: Investigating Rights and Responsibilities at Work**

**Unit reference number: K/503/2847**

**Level: 1**

**Credit value: 1**

**Guided learning hours: 10**

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## **Unit aim**

The aim of this unit is for learners to develop knowledge of employee rights and responsibilities, employer responsibilities and how the rights of employees are upheld in the workplace.

## **Unit introduction**

Everyone has the right to work in a healthy and safe environment, the right to be treated fairly and the right to be respected. This unit provides an introduction to the concept by discussing basic rights at work.

The laws that have been introduced to protect and support employees will be considered. Learners will be made aware of the laws and how to find out about them if they need further information.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know employee 'rights' and 'responsibilities' in a place of work	1.1	Outline employee 'rights' at work	<ul style="list-style-type: none"> <li>□ <i>Rights</i>: basic human rights, e.g. right to life, freedom, education, respect and dignity, to own property, equality before the law; rights at work, e.g. healthy and safe environment, working conditions, respect, privacy of personal information, fair pay/wages, paid holiday time, right to join and form trade unions</li> </ul>
		1.2	Outline employee 'responsibilities' at work	<ul style="list-style-type: none"> <li>□ <i>Responsibilities</i>: responsibility to protect, improve and not infringe others rights; work responsibilities, e.g. contractual obligations, health and safety requirements; appropriate training and development</li> </ul>
2	Know how the rights of individuals are supported in a place of work	2.1	Describe the factors that may affect the rights of individuals at work	<ul style="list-style-type: none"> <li>□ <i>Factors affecting rights of individuals</i>: positive images; perceptions, e.g. stereotyping, labelling; unfair discrimination and injustice; cultural background; ignorance or lack of human rights</li> </ul>
		2.2	Describe how to respect the rights of individuals at work	<ul style="list-style-type: none"> <li>□ <i>How to respect others</i>: appropriate behaviour, e.g. use of appropriate language, politeness in communicating with others, not putting others in danger or at risk through inappropriate behaviour in the workplace, showing tolerance and respect for differences and diversity, avoiding unfair discrimination against others, challenging own perceptions to ensure fairness of thought and action</li> </ul>
		2.3	Identify laws that can protect the rights of employees at work	<ul style="list-style-type: none"> <li>□ <i>Laws</i>: laws relating to employee rights, e.g. health and safety, working conditions, salary, equality of opportunity, discrimination, privacy of personal information (Data Protection Act, 1998)</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know the responsibilities of employers in a place of work	3.1	Identify employer responsibilities at work, in regard to: <ul style="list-style-type: none"> <li>• fulfilling a contract</li> <li>• health and safety</li> <li>• equal opportunities and prevention of discrimination.</li> </ul>	<input type="checkbox"/> <i>Employer's responsibilities:</i> health and safety; working conditions; contractual; equality of opportunity; confidentiality of employee information

## Information for tutors

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### Delivery

Tutors need to be creative in their approach to this unit which is largely based on knowledge and understanding rather than on skills. Active learning, however, can still be achieved, for example through learners going into the workplace to interview employers and employees or through role-playing scenarios. Debate and discussion should also be encouraged, particularly when defining terminology and considering rights and responsibilities beyond those enshrined in law.

Learners should be briefly introduced to the concept of rights and responsibilities in general before they focus on those that relate to the workplace. Discussion might include human rights, rights and responsibilities set out in legislation and those that are less formal such as those relating to particular groups or settings (for example within a school, college, society or club).

Learners would benefit from the opportunity to discuss terms associated with respecting the rights of others, for example stereotyping, labelling, prejudice, positive images, discrimination, ageism, racism, sexism, diversity, cultural background. Simple tasks can be used to help the learner understand these concepts, for example they could make a list of the things they believe in and value.

Learners could then consider how this might affect their work. Learners could also be encouraged to discuss how television or radio or magazine advertisements influence the way people think of others, for example through gender stereotyping or generalised perceptions of various cultures, nationalities or age groups. Discussions could then follow on how this could affect work. For example, women are often seen taking a domestic role at home and a much smaller percentage of women have high-paid jobs.

Scenarios could be used as a basis for research into the laws that have been put in place to protect the rights of individuals at work, for example a colleague or partner who has become pregnant. What are your colleague's rights and what rights does the partner have? What laws are in place to support them? Learners could find out where they can get help and advice both within the workplace and outside it.

Learners will probably find it useful to relate employer responsibilities to the particular aspects of rights and responsibilities they have covered when looking at them from an employee's perspective. They should be encouraged to think about how the employer, through meeting their responsibilities, allows employees to exercise their rights. (For example an employer's responsibility to maintain a healthy and safe workplace is put in place to ensure that employees' right to work in a healthy and safe environment is observed.)

### Assessment

For 1.1 and 1.2, learners must identify what rights and responsibilities an employee has in the workplace. Practical examples may help.

For 2.1, learners should be able to give examples of three different factors that may affect the rights of an individual in a place of work.

The evidence provided for 2.2 could be in the form of an information leaflet or booklet which explains how we should respect our colleagues at work. Alternatively, a written explanation or an oral presentation could be an effective method of assessment.

For 2.3, learners must identify three different laws relating to the rights of individuals at work. The learner should name the law and provide a brief, basic outline of the purpose of the law.

In 3.1, the focus is on the employer's responsibilities. The learner must be able to describe the employer's responsibilities at work in regard to fulfilling a contract, health and safety and equal opportunities/prevention of discrimination. Practical examples should be given to support each of these areas. At least one example is required for each area.

### **Suggested resources**

#### **Websites**

<a href="http://www.acas.org.uk/">www.acas.org.uk/</a>	Arbitration service, advice on health and wellbeing at work
<a href="http://www.adviceguide.org.uk">www.adviceguide.org.uk</a>	Citizens Advice Bureau
<a href="http://www.gov.uk/">www.gov.uk/</a>	General rights and responsibilities in the workplace including rights for people with disabilities, carers, older people and young people
<a href="http://www.tuc.org.uk/">www.tuc.org.uk/</a>	Trades Union Congress (TUC) downloadable leaflets about rights at work including details about minimum wage and equality in wages
<a href="http://www.worksmart.org.uk/rights/">www.worksmart.org.uk/rights/</a>	A TUC run website with information about rights at work (paternity and maternity leave, paid holiday etc).

## Unit 13:

# Managing Your Health at Work

**Unit reference number:** M/503/2848

**Level:** 1

**Credit value:** 1

**Guided learning hours:** 10

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### Unit aim

The aim of this unit is for learners to develop knowledge of risks to health in one area of work and how to maintain personal health when working in that area.

### Unit introduction

Where you work may have an influence on your health. For example, there is a risk of repetitive strain injury if a worker spends much of the working day using a keyboard and mouse, while those working with the public may be at risk of physical or verbal abuse.

This unit helps the learner to understand the different health requirements of a chosen area of work. It also considers how good personal health can be maintained in a chosen area of work by reducing health risks in the workplace.

### Essential resources

Learners will require access to appropriate information about health requirements and potential health risks for specific types of work.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know the risks to health for a chosen area of work	1.1	Describe risks to employee health for a chosen area of work	<ul style="list-style-type: none"> <li>□ <i>Areas of work:</i> different areas, e.g. office-based, service industry, outdoor, retail, public services, sport and leisure sector, hospitality and catering</li> <li>□ <i>Health risks:</i> physical and verbal abuse, bullying, use of specialist equipment, e.g. transporting chemicals, back injury, manual handling, minor injuries, e.g. slips, falls, trips, burns, spread of infection, stress</li> </ul>
2	Understand how to maintain good health in a chosen area of work	2.1	Explain measures to safeguard health for a chosen area of work	<ul style="list-style-type: none"> <li>□ <i>Reducing health risks:</i> appropriate equipment, e.g. supportive chair, keyboard rests; appropriate clothing, e.g. personal protective equipment (PPE); training and knowledge of procedures and rules, e.g. food safety rules; vaccination of staff, e.g. annual flu vaccination</li> </ul>
		2.2	Identify sources of information on safeguarding own health	<ul style="list-style-type: none"> <li>□ <i>Sources of information:</i> policies and procedures, supervisor or manager, government agencies, local authority, trade union, local community sources of advice</li> </ul>



## Information for tutors

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### Delivery

If learners know the vocational area that they would like to work in, or if they are already working in it, they can focus their learning on that vocational area. Otherwise learners should focus on a chosen area of work and consider the specific health requirements that relate to that area.

A wide range of delivery methods can be used to teach this unit, including tutorials, presentations, video, worksheets. As many practical activities should be included as possible to help learners relate to the content of the unit.

Small group discussions could be used to help identify the different areas of work that learners may be interested in working in. As far as possible, a range of vocational areas should be identified, including indoor and outdoor environments. Learners could then select one or more vocational areas and carry out research to identify the specific health requirements. For example, those working in a care home may be required to use lifting equipment while those working in the sport and leisure industry may be working outdoors for significant periods of time and therefore be exposed to the sun.

Small groupwork could focus on specific vocational areas and information gathered on potential health risks and ways in which to reduce those risks. Learners' research could also involve finding out about sources of information on health issues. Each group could present their findings to the other learners. Information could be presented using PowerPoint or paper-based materials. Learners could compile their information into a 'checklist' style document which could be designed as a reference for other learners.

Speakers from appropriate vocational areas could be invited to talk about the way in which their vocational area helps employees to manage their health at work.

### Assessment

For this unit, learners need to choose a specific vocational area. All the evidence that they present for assessment should be related to the chosen area of work. Learners should clearly identify the chosen vocational area on any work presented for assessment.

For 1.1, learners must describe the main health risks for their chosen area of work. They should provide details of each risk showing why it is a risk to health.

For 2.1, learners must explain ways to manage risks associated with their chosen area of work. For 2.2, they must identify sources of information about health issues at work. Learners could produce a leaflet or poster to evidence both of these. Alternatively, they could participate in a discussion which highlights health risks in their chosen vocational area, with the tutor recording the required descriptions and explanations provided by learners.

### Suggested resource materials

#### Websites

<a href="http://www.gov.uk/">www.gov.uk/</a>	Advice on health and safety at work.
<a href="http://www.workhealthwellbeing.gov.uk">www.workhealthwellbeing.gov.uk</a>	Wellbeing at work
<a href="http://www.worksmart.org.uk/health">www.worksmart.org.uk/health</a>	A TUC run website with information about rights at work

# Unit 14: Preparing for Work Placement

**Unit reference number:** F/503/2854

**Level:** 1

**Credit value:** 1

**Guided learning hours:** 10

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## Unit aim

This unit ensures that the learner will have information about the company or organisation providing the work placement, with regard to the responsibilities, as well as the appropriate behaviours and sources of support.

## Unit introduction

Before a learner begins a work placement, it is important that they understand the function of the company or organisation in which they are going to work. The learner will also set goals that will enhance their work placement experience.

Although the term 'company or organisation' has been used throughout this unit, it can refer to any type of work placement for which the learner may be preparing.

## Essential resources

To make this unit relevant, the learner must be in the process of preparing to go on a suitable work placement. Employers must be prepared for the learner arriving and support them in gathering relevant information.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know about the work placement company or organisation	1.1	Describe the work placement company or organisation	<ul style="list-style-type: none"> <li>Information of the company/organisation: type of company or organisation; location; size, e.g. small, large, branches throughout country, number of employees</li> </ul>
		1.2	Outline key objectives of the company or organisation	<ul style="list-style-type: none"> <li>Objectives of the company/organisation: function, e.g. service provision, retail, construction, administrative, logistics</li> </ul>
2	Know what is expected of the learner during the work placement	2.1	Identify the requirements for the placement, and why the requirements are necessary	<ul style="list-style-type: none"> <li>Work placement requirements: hours of work; absence procedures; dress code; line manager or supervisor; health and safety responsibilities, e.g. evacuation procedures, first-aid procedures, reporting hazards; refreshment facilities</li> <li>Why requirements are necessary: comply with health and safety rules, hygiene reasons, efficiency of working, promote good working relationships with colleagues and customers</li> </ul>
		2.2	Outline tasks likely to be undertaken in the work placement	<ul style="list-style-type: none"> <li>Expected tasks: daily duties, e.g. opening post, taking messages, checking emails, filing documents, checking equipment for health and safety purposes, setting up equipment, liaising with line manager, project work</li> </ul>
		2.3	Identify appropriate attitudes and behaviours for the work placement and why they are important in the workplace	<ul style="list-style-type: none"> <li>Attitudes and behaviours: positive attitudes, e.g. follow instructions, prepared to take on different or new tasks, dependable, confident but willing to learn, cooperative; behaviours, e.g. polite, on time, reliable, thorough</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		2.4	Identify appropriate steps that could be taken in situations of emotional stress, difficulty or confusion during the work placement	<ul style="list-style-type: none"> <li>□ <i>Why appropriate attitudes and behaviours are important:</i> e.g. creates positive impression of learner, helps learner get on with other people in the company or organisation, improves chances of a successful and enjoyable work placement</li> <li>□ <i>Taking appropriate steps in situations of emotional stress, difficulty or confusion:</i> using appropriate sources of support and guidance if an aspect of the work placement is causing emotional stress; asking questions if instructions are unclear or confusing; asking for help or guidance in carrying out a task if it is difficult or unclear</li> </ul>
3	Be able to set goals to help the learner get the most out of the work placement	3.1	Set appropriate goals for the work placement	<ul style="list-style-type: none"> <li>□ <i>Goals:</i> personal targets, e.g. attend each day, arrive on time, be enthusiastic; work-related targets, e.g. learn new skills, improve knowledge of specific sector or career, build confidence in asking for help if something is difficult or unclear; achievable and realistic goals, e.g. specific, within a set timescale, reasonable, within learner's abilities</li> </ul>

## Information for tutors

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### Delivery

Although each learner will be attending a different work setting, the principles behind preparing for the work placement will be the same. Before going out on work placement, the learner needs to find relevant information about the company or organisation to which they are going. They also need to know the types of information that they need to investigate. To do this, learners could work in small groups to identify the type of information they want to gather about the company or organisation. They could use the results of this discussion to compile a checklist or series of questions. Individual learners would then be able to base their research on these questions. Checklist items could include, for example, size of company or organisation, function of company or organisation, its location or locations. Learners could gather this information by undertaking internet searches. Other sources of information could include the company or organisation's own website, promotional leaflets or brochures, resources such as Jobcentre Plus, discussions with learners who have previously been on work placement at the same (or similar) company or organisation, and conversations with staff from the company or organisation.

Before learners attend the work placement, they should find out key facts relating to their placement, for example what the company or organisation does, its key objectives, where they will be located, their expected hours of work, the main tasks they will undertake and the dress code. This information could be gained as a result of an interview with the employer or talking with someone who has previously worked in the organisation. If this is not possible, the learner could identify the 'high priority' information they need before their first day and telephone or email the employer to obtain the information. Information that is not 'high priority' could be gained on the first day of the work placement.

Leaflets or information sheets issued to learners, video and tutor-led group discussions could all be used to help learners find out about the main tasks relating to the job role or main areas of learning at the company or organisation. The information provided to the learner should be straightforward and clearly presented so that they can extract the relevant details independently. Learners who have previously participated in work experience could be asked to speak to learners in small groups.

Tutors could emphasise the importance of workplace values and rules and, where possible, provide lists of the possible attitudes and behaviours needed to satisfy the requirements of the work placement. Learners need to articulate why certain attitudes and behaviours are necessary for their work placement. Employers could be invited as guest speakers to discuss expectations, or learners could discuss possible qualities and expectations in small groups or via role-play situations. Workplace scenes from television programmes, films or other video clips could be used as a starter for discussions.

Learners going into a work placement might feel nervous and concerned that they will appear incompetent or will not be able to do what they are instructed to do. It would be beneficial, therefore, for learners to be prepared to deal effectively with any potential feelings of stress or confusion. For example, a group discussion or role-play activity could be used to help learners think about appropriate ways to solve situations of stress, anxiety or confusion and how to ask others for help and guidance during the work placement. Alternatively, learners could watch a TV or film clip that depicts a stressful or difficult situation in the workplace and then hold a group discussion about what could be done to resolve the stress, difficulty or

confusion in that scenario. This could help address learners' fears and concerns about handling any confusing or difficult situations they may encounter.

Learners may discuss possible goals and examples of goals in group situations and/or individually with tutors or careers advisers, but need to come up with their own final list of personal goals for the work placement.

## Assessment

For 1.1, the learner must be able to describe the company or organisation where they plan to carry out the work placement. Information should include aspects such as the size, type of business, location or locations and business function.

For 1.2, the learner must outline at least one key objective of the company or organisation where they plan to carry out the work placement.

Although information may be gathered from the company or organisation website or from documentation provided by the company or organisation, the outline provided must be in the learner's own words and demonstrate a clear understanding of the organisation to which they are going.

For 2.1, the learner can complete a checklist which identifies the requirements of the company or organisation for the work placement, for example hours of work, dress code and absence procedures. Alternatively, the learner may wish to record the description in a different format. At least two different requirements must be identified and a reason given why each one is necessary. The learner could give verbal descriptions (noted by the tutor) of why the requirements are necessary, or record the reasons as notes on the checklist or other means of evidence.

For 2.2, the learner must describe at least two different tasks that they will undertake in the work placement. These could be recorded in any suitable format such as a written document, leaflet or poster. Other means of evidence (for example discussion with the tutor accompanied by a tutor statement) could also be used.

For 2.3, the learner needs to identify at least two attitudes and two behaviours that they should demonstrate in the workplace. For each attitude and behaviour, they need to explain why they are important. These could be recorded in any suitable format such as a written document, leaflet or poster. Other means of evidence (for example discussion with the tutor accompanied by a tutor statement) could also be used.

For 2.4, the learner must identify at least two different examples of a positive step they could take if they found themselves in a situation of emotional stress, difficulty or confusion during the work placement. The positive steps identified can be straightforward but should be articulated in the learner's own words.

3.1 must relate directly to the learner's work placement. They need to set at least two appropriate goals, one of which may be personal, for example get to work 10 minutes early every day, or work-related, for example learn how to use the photocopier confidently by the end of the second day. The goals should be presented in an appropriate format such as presentation, chart, poster, or written statement provided by the learner, with supporting notes from the tutor, evidence from tutorials or taped discussions verified by the tutor.

## Suggested resources

### Websites

[www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html) Project management resource giving advice on setting SMART goals

[www.work-experience.org](http://www.work-experience.org) National Council for Work Experience

# **Unit 15:**                      **Learning from Work Placement**

**Unit reference number:** J/503/2855

**Level:** 1

**Credit value:** 2

**Guided learning hours:** 10

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## **Unit aim**

The aim of this unit is to ensure that learners reflect on their work placement, identify what they did well and what they could do differently in future, and, from this, create appropriate short-term goals.

## **Unit introduction**

Work placement can be a valuable experience for all learners. It provides an opportunity to practise skills already gained, acquire new skills and develop a knowledge of the working environment. To maximise the experience, learners will be required to identify learning gained from the work placement and then use that learning to set short-term goals.

Before starting this unit, the learner must have experienced a work placement and be aware that the information gathered from that experience will be used as a basis for this unit. The learner needs to have gathered evidence of tasks undertaken during their work placement.

## **Essential resources**

Learners must undertake a period of work placement before taking this unit.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to reflect on what has been learned from the work placement	1.1	Keep an accurate record of tasks undertaken during work placement	<ul style="list-style-type: none"> <li>□ <i>Evidence of tasks undertaken:</i> e.g. employer reference, tutor report, description of tasks undertaken, video log, reports, minutes of meetings attended; record of tasks undertaken kept in work diary or logbook</li> <li>□ <i>Record-keeping:</i> methods of recording information, e.g. portfolio, CD ROM, video, handwritten, electronic, word-processed; oral and written presentation</li> </ul>
		1.2	Identify what has been learned from key tasks undertaken during the work placement experience	<ul style="list-style-type: none"> <li>□ <i>What was learned from work placement tasks:</i> skills, e.g. self-management, communication, teamwork, business and customer awareness, problem solving, how to work accurately with numbers, IT skills, technical skills, use of equipment; product or service awareness</li> </ul>
2	Know how tasks could be undertaken differently or improved	2.1	Identify tasks undertaken during the work placement that could be carried out differently or improved	<ul style="list-style-type: none"> <li>□ <i>What could be carried out differently:</i> e.g. complete task more thoroughly or quickly, involve another colleague in assisting or overseeing, use different equipment or method, ask for help when needed, clarify instructions, ask questions, investigate all options before acting</li> </ul>
		2.2	Outline different ways to carry out tasks	
3	Be able to use learning from work placement to set short-term goals	3.1	Set short-term goals which build on own learning from work placement	<ul style="list-style-type: none"> <li>□ <i>Short-term goals building on learning from tasks:</i> e.g. skills and knowledge development (e.g. further study, investigate specific career options or work areas), apply for full-time employment, seek voluntary work in a particular area; developing interpersonal skills, e.g. soft skills</li> </ul>



## Information for tutors

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### Delivery

For this unit, the learner must have had experience in a work placement. The length of time spent in the work placement is not defined. However, sufficient time must be given to allow the learner to meet the assessment criteria.

The learner will be expected to have gathered evidence of the tasks or activities that they are involved in during their work placement. They will then be able to use the evidence to demonstrate competence for each assessment criterion. Before starting the work placement, a group discussion can be used to identify different forms of evidence. This could include employer or tutor reports, evidence of work completed, descriptions of tasks or activities undertaken — perhaps in the form of a diary or minutes of meetings that the learner attended or facilitated. The learner must adhere to the company policy on confidentiality and intellectual property.

Different methods of record-keeping should be discussed. Examples of previous work could be shown. Paper-based and/or electronic record-keeping methods may be used.

At a review meeting with a tutor on return from work placement, learners need to describe what they have learned by undertaking different tasks, giving examples in each instance. They may need some encouragement and prompting to help identify what was learned.

Small group discussions, class presentations or one-to-one tutorials could be used to allow learners to explain what they could have done differently. Examples could include prioritising time better, asking additional questions, clarifying the task, or learning a new skill that would have made the task easier.

Learners could discuss with a tutor, teacher or careers adviser their possible options for future career plans that build on their learning experience from the work placement. They can set realistic goals in respect of courses, training programmes, employment opportunities or further investigation of careers and industry types.

### Assessment

Assessment for this unit could be a single task which provides evidence of all assessment criteria or smaller tasks which relate to individual criteria.

For 1.1, learners must gather and record evidence of tasks undertaken in the work placement. This evidence can then be used as a basis for the remaining assessment criteria. This can take the form of a diary which outlines what has been achieved during the day.

Alternatively, learners may gather evidence of work undertaken, including reports or references from employers and colleagues, video logs or witness statements. The evidence produced could include information about what the learner was asked to do, what the timescale was for completion, if they met the timescale, what skills were needed to complete the task and who they had to work with to complete the task.

For 1.2, learners need to choose two tasks from 1.1 and describe what they learned as a result of completing the task. The learner can draw on the insight gained through the review meeting with the tutor on return from work placement but they need to choose the two tasks independently and decide what was learned from them. The learner could make reference to what they learned about themselves in terms of personal skills and attributes or to what they learned about the practical aspects of the task. This could include acquiring a new skill or learning new terminology.

For 2.1 and 2.2, learners may require some support from the tutor in considering what they could have done differently in carrying out a specific task from the work placement. However, the learner must be able to choose two different tasks independently from the evidence gathered in 1.1 and outline how they would do the task differently if asked to do it again.

For 3.1, the learner is required to set at least two short-term goals which build on the learning that they gained from completing tasks in the work placement.

### **Suggested resources**

#### **Websites**

<a href="http://www.direct.gov.uk/en/EducationAndLearning">www.direct.gov.uk/en/EducationAndLearning</a>	Government website – Education and Learning
<a href="http://www.work-experience.org">www.work-experience.org</a>	National Council for Work Experience

# Unit 16: Working in Business and Administration

**Unit reference number:** F/502/4009

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 30

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## Unit aim

This unit gives learners an overview of what working in business administration can be like. In particular, understanding roles of those they are working with, how to carry out routine tasks and the appropriate way to present themselves.

## Unit introduction

Learners will be introduced to the different activities carried out by people working in administration and they will be required to follow instructions in order to carry out routine administrative tasks, using key office equipment. Learners will also gain an understanding of the role that a person working in an administrative role has, in helping the team to achieve its goals.

People working in administrative roles must be able to present themselves in a positive way, particularly when undertaking work for, or dealing with, colleagues and customers. Learners will be required to present themselves positively, both in relation to their appearance and their manner and behaviour.

Anyone working in an administrative role must be able to organise their time and prioritise tasks. Learners will have the opportunity to develop their knowledge and understanding of how to do this, for example through the use of tools such as task lists.

Finally, the unit looks at confidentiality of information and learners will consider the types of information that need to be confidential and the importance of keeping it confidential.

## Essential resources

Centres need access to typical office equipment, such as a telephone and computer, so that learners can practise and develop their skills when interacting with others.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the role of an administrator within an office	1.1	Describe different activities carried out by administrators	<ul style="list-style-type: none"> <li>□ <i>Activities</i>: checking, collating and providing information; answering the telephone and making calls; producing documents using IT, e.g. letters, agendas, invoices; filing and retrieving documents; collecting, sorting and distributing mail; preparing outgoing mail; receiving visitors; coordinating arrangements for meetings, e.g. sending information to delegates, booking meeting room; maintaining diary or calendar for individual or team; making travel arrangements</li> </ul>
		1.2	State how the work of an administrator helps a team achieve its goals	<ul style="list-style-type: none"> <li>□ <i>Achieving team goals</i>: ensuring communication within the team; helping other team members; monitoring and prioritising work for the team; ensuring all of the team works to same priorities</li> </ul>
2	Be able to carry out routine administrative tasks	2.1	Follow instructions to complete routine administrative tasks	<ul style="list-style-type: none"> <li>□ <i>Following instructions</i>: listening; questioning if unsure; confirming understanding; checking instructions carried out properly</li> <li>□ <i>Routine tasks</i>: types of task, e.g. answering the telephone, producing documents, filing and retrieving documents, collating documents</li> </ul>
		2.2	Use key equipment according to organisational procedures	<ul style="list-style-type: none"> <li>□ <i>Key equipment</i>: confirming the equipment needed for the task; types of office equipment, e.g. telephone, computer, fax, photocopier, printer, scanner, filing equipment</li> <li>□ <i>Procedures</i>: types of procedure, e.g. concerning proper use of equipment (following manufacturer's instructions, keeping equipment clean, reporting problems, leaving equipment ready for next user) health and safety (seating, posture) disposal of materials, preventing waste</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to present themselves positively	3.1	Dress appropriately	□ <i>Appearance</i> : following dress code; smart; clean
		3.2	Adopt a positive manner in dealings with colleagues and/or customers	□ <i>Manner</i> : friendly; polite; using communication skills, e.g. listening, questioning, speaking clearly, being tactful
4	Be able to organise their work effectively	4.1	Use simple tools to organise their time	□ <i>Organising time</i> : types of tools to organise time, e.g. task list, work schedule
		4.2	Prioritise tasks in discussion with their supervisor or manager	□ <i>Prioritising</i> : monitoring work; checking against deadlines; checking with supervisor; examining other commitments
5	Know the importance of confidentiality of information	5.1	State the reasons why it is important to keep some information confidential	□ <i>Reasons for confidentiality</i> : to prevent theft, e.g. identify theft, fraud; to avoid company sensitive information falling into a competitor's hands; the need to comply with the Data Protection Act
		5.2	Give examples of information that should be kept confidential	□ <i>Confidential information</i> : types of confidential information, e.g. customer records, employee records, commercially sensitive information, overheard conversations

## Information for tutors

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### Delivery

The purpose of this unit is to introduce learners to the administrative environment and for them to experience different types of administrative tasks. The unit will encourage learners to think realistically about what it would be like to be employed in an administrative role. Learners would benefit from access to a practice office or the office in the learning environment, in order to carry out tasks and use office equipment. Guest speakers could provide useful input on the importance of following instructions and organisational procedures accurately, as well as on the importance of presenting oneself appropriately with regard to dress and manner. Examples of tools used to organise time, such as task lists, would be helpful when discussing organising time and prioritising tasks.

Learners should have the opportunity to carry out practical tasks, whether through using a model office at the centre or through external links. Learners must have access to office equipment so that they can practise their tasks.

Discussions should take place regarding types of confidential information and the importance of keeping some information confidential. Learners could discuss information relating to themselves that they regard as confidential and how they would feel if others knew about it. The centre's own rules relating to confidentiality could be used as an example.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Small-group discussion on types of administrative tasks that may exist in an office.

Learners visit a large office to observe the main administrative roles in different departments such as customer service, reception, finance.

In pairs, learners discuss the different administrative roles that may exist in a small and a large business.

Tutor-led discussion – What makes a good team? How can an administrator contribute to a team?

Assessment – learners produce a job description for an administrative role provided by the tutor. Learners must describe at least four different activities that someone in that administrative role would need to carry out.

Assessment – one-to-one discussion with the tutor on how an administrator can help a team to achieve its goals (learning outcome 1).

Tutor-led discussion on the importance of communication and active listening. Why is communication so important in administration? Why is it important to listen to instructions, and to confirm that you have understood them?

Role-play activities – learners to take it in turns to role play both the administrator and the colleague/client. They will be given a range of role-play scenarios to complete.

## Topic and suggested assignments/activities (continued)

Tutor-led discussion on organisational procedures in relation to the use of office equipment, for example in relation to health and safety, minimising waste.

Tutor-led demonstrations on how to use a range of office equipment. Learners to take it in turns to use the equipment.

Group discussion on the importance of presenting oneself positively. Tutor to provide examples of company dress codes to aid discussion.

Learners to watch a DVD on adopting a positive manner when dealing with colleagues and/or customers.

Role-play activities – in pairs, learners take it in turns to play the administrator and client in a range of situations provided by the tutor. Learners to practise adopting a positive manner.

Tutor-led discussion on the importance of organising time and prioritising work.

Exercise – tutor to provide a list of tasks that need to be completed. In small groups, learners practise completing work schedules or task lists, and placing the work in the correct order of priority.

Assessment – the tutor must give learners instructions to complete a series of administrative tasks. Learners must complete the tasks demonstrating the following:

- carrying out the task correctly, according to instructions
- use of key equipment where appropriate (at least two tasks)
- a positive manner
- appropriate dress
- use of tools to organise time
- correct prioritisation of work (learning outcome 2, learning outcome 3, learning outcome 4).

Tutor-led discussion – what types of information need to be kept confidential? Why is it important to keep some information confidential?

Exercise – tutor to give learners different types of information. Learners to decide whether the information should be confidential.

Exercise – learners to think of something about themselves that they would rather other people in the class did not know. How would they feel if that information was made public?

Assessment – in a one-to-one discussion with the tutor, learners must give examples of types of information that must be kept confidential, and say why this is important.

Assessment feedback, review and evaluation of unit.

## Assessment

To achieve assessment criterion 1.1, learners must describe at least two different activities administrators carry out and, to achieve 1.2, learners must state at least two ways that administrators can help to achieve team goals. This can be evidenced through discussions or question and answer sessions with the tutor, or through completing a pro forma. For example, learners could produce a job description for an administrative role. Any question and answer sessions or discussions would need to be taped and a witness statement included.

To achieve 2.1, learners must be observed completing at least two administrative tasks such as answering a telephone call, collating documents or creating a document. To achieve 2.2, they must be observed using two types of key equipment, according to organisational procedures, such as a telephone, computer, photocopier. These could be used to carry out the same tasks for 2.1. These tasks could also relate to 4.1 and 4.2.

To achieve 3.1, learners need to have dressed appropriately for an administrative role, perhaps following a dress code set by the tutor. To achieve 3.2, they should be observed adopting a positive manner with peers and tutors and (if appropriate) any other people they may come into contact with during the course, for example customers or visiting speakers.

Assessment criteria 2.1, 2.2, 3.1 and 3.2 must be evidenced by a video recording and a witness or observation statement.

To achieve 4.1, learners should be observed using tools to organise their time and prioritise tasks in discussion with the tutor (these could be the tasks carried out for 2.1 and 2.2). This could be evidenced by producing a flow chart as a timeline produced after discussion with the tutor.

To achieve 5.1, learners should state reasons why it is important to keep some information confidential and, for 5.2, should give examples of at least two types of confidential information. This can be evidenced through discussion or question and answer sessions with the tutor or through completion of a pro forma. Learners could produce a chart of confidential information matched against reasons for confidentiality.

All witness statements and observation records should be retained for verification purposes.

## Suggested resources

### Books

Barker A – *Improve your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)  
ISBN 9781846909214

### Websites

[www.skillsfcfa.org](http://www.skillsfcfa.org)

Council for Administration

[www.hse.gov.uk](http://www.hse.gov.uk)

Health and Safety Executive – information on health and safety in the workplace



# Unit 17: Communicating Electronically

**Unit reference number:** A/501/7236

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 30

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## Unit aim

In this unit learners will develop their skills in communicating electronically using different methods such as the telephone, emails, faxes and text messaging. Learners will be able to identify appropriate methods of communication and the correct protocols for communication using these methods.

Learners will also learn how to use the internet while maintaining safety and security.

## Unit introduction

Most administrators need to be able to communicate electronically and there are many forms of electronic communication systems. This unit focuses on four different methods ie emailing, faxes, texting and the internet.

Learners need to know how to send, receive and forward email messages. They need to know the type of language used in emails and the potential ambiguities that may occur due to inappropriate language.

Learners will also learn how to prepare and send a fax. Many learners will know how to send text messages but once again the emphasis is on sending clear and accurate text. The final learning outcome focuses on the use of the internet in business. Learners may discuss situations where the internet may be used. They should also discuss security including the use of passwords and firewalls. Office procedures relating to the internet may also be discussed.

## Essential resources

Centres need to have access to typical office equipment such as a telephone and computer so that learners can practise and develop their skills when interacting with others. Learners will also need access to research facilities and internet access. The use of DVDs and videos is useful to illustrate interpersonal skills and how 'not to do it'. Guest speakers can provide a valuable input to support the underpinning knowledge and understanding of the unit.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to communicate electronically	1.1	Send, receive and forward emails	<ul style="list-style-type: none"> <li>□ <i>Different people</i>: customers – internal, e.g. colleagues, peers, those more junior, those more senior, those in same team/department, those in other departments; external, e.g. people from different organisations, members of the public; people with individual needs, e.g. those for whom English is not the first language</li> <li>□ <i>Emails</i>: sending, receiving, forwarding, replying to emails; sending and receiving attachments; using cc, bcc; tone of email – appropriate language, clarity, politeness; risks, e.g. emails from unknown users; downloading documents or software, sharing information such as chains of emails, personal details</li> </ul>
		1.2	Prepare and send a fax	<ul style="list-style-type: none"> <li>□ <i>Faxes</i>: when to use faxes; layout, organisational templates; need for clear, accurate language; using fax cover sheets</li> </ul>
		1.3	Prepare and send a clear and accurate text message	<ul style="list-style-type: none"> <li>□ <i>Text messages</i>: when to use text messages; need for clarity, accuracy</li> </ul>
2	Be able to use the internet securely	2.1	Log on to the internet	<ul style="list-style-type: none"> <li>□ <i>Use</i>: types of service, service providers, levels of service, e.g. dial-up, broadband network connection; logging on, passwords; use of search engines; saving results of searches; use of appropriate and inappropriate websites</li> </ul>
		2.2	Access an appropriate website showing awareness of security	<ul style="list-style-type: none"> <li>□ <i>Security</i>: the need to keep passwords secret; software issues, e.g. viruses and virus protection, firewalls, updating; risks, e.g. dangers of file sharing, making personal details known leading to identity theft, loss of information</li> </ul>

## Information for tutors

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### Delivery

This is essentially a practical unit. It is important for learners to have the opportunity to demonstrate their communication skills in workplace situations. This may be under simulated conditions but within a realistic context. Learners can discuss, either in a group or one-to-one, different aspects of the unit such as the appropriate tone and language to use when sending an email to colleagues. This would be helpful in providing evidence for assessment. For example, learners can discuss the different types of electronic written communication, then divide into small groups to explore the situations these are most appropriate for.

Useful activities to support delivery include discussions, visits to commercial organisations, role play and other practical experience, including a work placement or evidence from a part-time or full-time job. Case studies, which help to identify a range of different types of communication, together with their associated advantages and disadvantages, may be useful.

Within the classroom, or within a learner's own job role if appropriate, there should be plenty of opportunity to develop skills in using electronic communication and there would be the opportunity to practise constructing emails, faxes and text messages, for example sending an email to a colleague confirming a meeting venue. Tutors can show examples of good practice in using electronic communication, and learners can then work in small groups to examine other documents for their accuracy.

Learners may have their own email account set up by the centre as part of their user account profile but they would also need to understand the principles of setting up a personal account. It is, therefore, encouraged that they set up a third party email account using a web-based provider (for example Hotmail). This will allow them to understand the importance of passwords and user names. Learners will be expected, through regular use, to familiarise themselves fully with all email services.

Learners should provide records to support how they have demonstrated good communication skills in a practical context. This may be in the form of a logbook, observations by the tutor or witness testimonies.

Discussion should also take place regarding the appropriate and inappropriate use of the internet and learner responsibilities, using concrete examples. Learners should be encouraged to use Safe Searching and Adult Filter options built into familiar web browsing software. If the organisation has an existing policy for the use of the internet and for email then this should be clarified before the programme gets underway.

## Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
<p>Introduction to unit and structure of the programme of learning.</p> <p>Tutor-led discussion on types of electronic communication.</p> <p>Small group discussions on the range of different people that someone working in administration needs to communicate with, including internal and external customers and people with specific needs.</p> <p>Tutor-led discussion on emails including:</p> <ul style="list-style-type: none"><li>• the tone of emails, formal and informal language</li><li>• risks such as sending emails to or receiving emails from unknown users; downloading attachments; sharing information.</li></ul> <p>In pairs, learners to practise creating, sending and receiving emails to each other including attachments.</p>
<p>Tutor-led discussion on when and how to send a fax.</p> <p>Activity – learners to practise sending a fax.</p>
<p>Tutor-led discussion on when to use a text message in a business situation, and the need for clear accurate language.</p> <p>In pairs, learners to practise sending each other business text messages.</p>
<p>Assessment – tutor to provide a range of activities for the learner to demonstrate communication dealing with a range of customer enquiries which include communicating by email, fax and text message.</p> <p>Learners to carry out an exercise according to a scenario set by the tutor. The learner must prepare a business email and send it to the appropriate person (e.g. the tutor or another learner). The email will be sent back to them with additional information. The learner will then have to forward the email to the appropriate person.</p> <p>Learners to decide when it is appropriate to send a fax from a given scenario, and to prepare and send a fax.</p> <p>Learners to decide when it is appropriate to send a text message from given scenario, and to prepare and send a business text message (learning outcome 1).</p>
<p>Tutor-led discussion on the centre IT and internet use agreement policy.</p> <p>Tutor-led discussion on different services providers and levels of service.</p> <p>Tutor-led discussion on appropriate and inappropriate use of the internet.</p> <p>Learners to practise using 'Safe Searching' and 'Adult Filter' options.</p>
<p>Assessment – learners demonstrate correct and responsible use of the internet by practical demonstration during small group sessions, and through direct questioning (learning outcome 2).</p>
<p>Assessment feedback, review and evaluation of unit.</p>

## Assessment

Evidence for 1.1, 1.2 and 1.3 may include a collection of documented evidence including printouts of faxes and emails sent, received and forwarded by the learner. The use of text messages should be evidenced by an observation report. The language and style of the email, fax and text message should be in line with the Level 1 Functional Skills for writing, and the learner should use language appropriate to the purpose and audience. It is important that the learner can establish they have used the most appropriate method of interaction and this may involve group discussion or one-to-one questioning with the tutor, ensuring that evidence is available for internal and external verification purposes.

Assessment Criteria 2.1 and 2.2 may be assessed by the use of a tutor witness statement that lists the learner's correct and responsible use of the internet. Learners should show that they are aware of the need for security when using the internet.

## Suggested resources

### Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)  
ISBN 9781846909214

### Websites

[www.microsoft.com/atwork/getworkdone](http://www.microsoft.com/atwork/getworkdone)      Microsoft advice on how to construct written documents

[www.skillsca.org](http://www.skillsca.org)      The Council for Administration

# **Unit 18: Making and Receiving Calls**

**Unit reference number: T/502/4007**

**Level: 1**

**Credit value: 2**

**Guided learning hours: 20**

## **Unit aim**

This unit aims to develop the learners' knowledge, skills and understanding of administrative tasks associated with making and receiving telephone calls or other suitable electronic equipment.

## **Unit introduction**

In this unit learners will develop their communication skills when dealing with calls using the telephone or other suitable electronic equipment. Learners will be able to identify and use the correct protocols when making and receiving calls, and they will develop their awareness of the types of organisational procedures which must be followed.

Learners will also develop their knowledge of how to create a positive impression while making and receiving calls, and why it is important to an organisation that calls are handled correctly.

## **Essential resources**

Centres need to have access to typical office equipment, such as a telephone and a computer, so that learners can practise and develop their skills when interacting with others.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to make calls	1.1	Identify the purpose of the call	<ul style="list-style-type: none"> <li>□ <i>Making a call</i>: listening to instructions; identifying purpose of the call; confirming name and number of person to be contacted; asking questions if unsure; communicating information to achieve call purpose; summarising outcomes of the conversation before ending call; following instructions when making the call; giving clear, accurate information</li> </ul>
		1.2	Confirm the name and number of the person to be contacted before making the call	
		1.3	Make a call communicating basic information clearly and accurately	
2	Be able to receive calls	2.1	Answer the call promptly and politely, observing any organisational procedures	<ul style="list-style-type: none"> <li>□ <i>Answering a call</i>: following organisational procedures, e.g. answering call within set time; giving correct greeting; identifying caller and where they are calling from; identifying caller's needs; tone of voice; the need for clarity; listening; questioning; checking; providing accurate and up-to-date information; summarising outcomes of conversation before ending call</li> </ul>
		2.2	Identify the caller, where they are calling from and the reason for their call	
		2.3	Follow any organisational procedures relating to confidentiality and security	<ul style="list-style-type: none"> <li>□ <i>Confidentiality and security</i>: types of confidential information, e.g. personal calls, calls concerning personal details, e.g. payment; calls concerning company sensitive information; danger in giving confidential details over the telephone; organisational procedures concerning confidentiality and security, e.g. only certain people have access to some types of information, certain types of information are not given over the telephone</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		2.4	Take short messages	<ul style="list-style-type: none"> <li>□ <i>Taking messages</i>: summarising call; noting date, time, caller's name and number, purpose of call; the need for clear, accurate messages; level of urgency; action required by recipient</li> </ul>
3	Know why it is important to an organisation that calls are handled appropriately	3.1	State how appropriate tone and language create a positive impression	<ul style="list-style-type: none"> <li>□ <i>Positive impression</i>: tone of voice; politeness; clarity; listening; questioning; checking information when taking message; providing accurate, up-to-date information</li> </ul>
		3.2	State how creating a positive impression during a call benefits the organisation	<ul style="list-style-type: none"> <li>□ <i>Benefits</i>: gives caller confidence in the organisation; if an accurate message is taken, the caller's needs can be dealt with more quickly; may lead to repeat business</li> </ul>



## Information for tutors

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### Delivery

This is essentially a practical unit. It is important for learners to have the opportunity to demonstrate their communication skills when making and receiving calls. This may be under simulated conditions but within a realistic context. Learners can discuss, in a group or one to one, the different skills required when making and receiving calls.

Through role play and discussion, learners can participate in verbal communication activities on the telephone and be encouraged to provide constructive feedback on their peers' communication skills. Learners should be encouraged to focus actively on what others are communicating and to question things they are not sure about. Different scenarios should be provided so learners can practise communicating. Within a supportive classroom environment learners will have the opportunity to make positive contributions to discussions and this active involvement should help to develop confidence.

Useful activities to support delivery include discussions, visits to commercial organisations, role play and practical experience.

Learners should be provided with role-play scenarios so that they can practise making and receiving calls. Group or one-to-one discussions can look at procedures relating to security and confidentiality and the importance of giving a positive impression.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
<p>Introduction to unit and structure of the programme of learning.</p> <p>Learners watch DVD on good telephone practice.</p> <p>Group discussion – what type of information is it necessary to be sure of before making a call? What type of information is it necessary to give while making the call?</p> <p>Learners to start compiling a checklist of good telephone communication skills.</p> <p>Role-play exercises – learners practise making calls and communicating information.</p> <p>Assessment – learners to be observed preparing to make and then making a call based on a scenario provided by the tutor (learning outcome 1).</p>
<p>Group discussion – why is it important to answer calls according to organisational procedures? Why are there specific procedures relating to confidentiality and security? Tutor to provide examples of organisational procedures for answering calls (these can be the centre's own procedures).</p> <p>Tutor-led discussion on the use of appropriate tone and language when making and receiving calls, and how this can benefit an organisation.</p> <p>Role-play exercises with peer observation – learners practise taking calls based on procedures provided by the tutor. Learners to recognise where the information requested may be confidential. Peer feedback on whether the learner created a positive impression.</p> <p>Group discussion – what information is it necessary to include when taking a message?</p>

## Topic and suggested assignments/activities (continued)

Learners to add to their checklist of good telephone practice.

Assessment – learners to be observed receiving a call based on a scenario set by the tutor. They must write down at least two messages which should be retained as evidence (learning outcome 2).

Assessment – learners to record how to create a positive impression through the use of appropriate tone and language, and how this benefits the organisation for future reference (learning outcome 3).

Assessment feedback, review and evaluation of unit.

### Assessment

Assessment criteria 1.1, 1.2, 1.3 and 2.1, 2.2, 2.3, 2.4 can be evidenced through simulated activity such as role play, with learners making and receiving calls. For 1.1 and 1.2, the tutor can give learners a scenario with some background to the call to be made. Learners will need to make the call to achieve 1.3 and be observed giving clear and accurate information. This will need to be evidenced through taped evidence or through a witness or observation statement.

To achieve 2.1 and 2.2, learners will need to take the call within a set timescale identifying the caller and purpose of the call politely, following any given organisational procedures. To achieve 2.3, they will need to observe any given procedures relating to confidentiality and/or security. To achieve 2.4, they will need to record a message. This may be written and include date, time, name of caller and purpose of call.

Assessment criteria 3.1 and 3.2 can be assessed through a group or one-to-one discussion with the tutor. Learners must identify how tone and language create a positive impression and, in 3.2, they must state two benefits of this for the organisation. These criteria should be evidenced through dictaphone or video evidence.

### Suggested resources

#### Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)  
ISBN 9781846909214

#### Websites

[www.skillsca.org](http://www.skillsca.org)                      The Council for Administration

[www.chalkface.com](http://www.chalkface.com)                      Worksheets on practical communication skills for the workplace

# Unit 19: Welcome Visitors

**Unit reference number:** M/502/4006

**Level:** 1

**Credit value:** 2

**Guided learning hours:** 20

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## Unit aim

This unit aims to develop learners' knowledge, skills and understanding of administrative tasks associated with welcoming visitors.

## Unit introduction

Learners who are interested in working in a business administration role are often required to welcome and deal with visitors, either while working on reception or as part of a wider role.

Working on a reception desk is a major administrative role and welcoming visitors properly is very important. It is important that those working in administrative roles are able to follow organisational procedures, such as asking questions in order to establish the purpose of the visit, contact the correct part of the organisation's security and carry out procedures such as signing in. Learners also need to ensure that visitors feel welcome during any period of waiting.

It is important that people working in administrative roles are able to present a good impression of their organisation, and learners will gain an understanding of the effect that their own verbal and body language can have. Finally, learners will develop their understanding of how visitors are welcomed can benefit the organisation.

## Essential resources

Centres need access to a typical reception workplace, with suitable equipment and system that learners can practise and develop their skills. It could be a model office, the centre's administration office or a visit to an office at a local business. Visits to local organisations should be encouraged and guest speakers will add currency and vocational relevance to the topic.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit, a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to welcome visitors in a positive way	1.1	Welcome visitors and establish the purpose for their visit	<ul style="list-style-type: none"> <li>□ <i>Welcome visitors</i>: types of visitors, e.g. members of the public, other members of the organisation, clients, suppliers, delivery people; greeting visitors, e.g. manner, smile, politeness; establishing purpose of visit</li> <li>□ <i>Purpose of visit</i>: different types of visit, e.g. to meet with an employee of the organisation; to attend a large meeting or conference as delegate; to deliver post or supplies; to request information</li> </ul>
		1.2	Follow organisational procedures for receiving visitors	<ul style="list-style-type: none"> <li>□ <i>Organisational procedures</i>: security procedures, e.g. signing in, visitor badges; contacting appropriate person in organisation; giving directions if appropriate</li> </ul>
		1.3	Answer routine questions	<ul style="list-style-type: none"> <li>□ <i>Routine questions</i>: types of routine question that may be asked, e.g. where facilities are; whether someone in the organisation is available; how long the visitor will need to wait; the need for polite, clear and accurate responses; contacting someone else when unsure of answer</li> </ul>
		1.4	Make visitors feel welcome during any period of waiting	<ul style="list-style-type: none"> <li>□ <i>Waiting</i>: directing visitors to where they can wait, e.g. a seat in reception area; giving indication of how long the visitor may need to wait if appropriate; other factors e.g. offering tea/coffee</li> </ul>
		1.5	Use appropriate tone and language, including body language, when dealing with visitors	<ul style="list-style-type: none"> <li>□ <i>Tone and language</i>: clarity of speech, politeness; friendly tone; body language, e.g. use of eye contact</li> </ul>
2	Know why it is important to an organisation that visitors are made welcome	2.1	State how treating visitors politely and in a positive way benefits organisation	<ul style="list-style-type: none"> <li>□ <i>Benefits</i>: members of public or clients receive positive impression of organisation; may lead to, e.g. positive appointment or meeting, increased business in future</li> </ul>

## Information for tutors

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### Delivery

This is a practical unit. Learners will need to be able to develop and practise the administrative skills needed to welcome visitors, such as establishing the purpose of the visit and contacting the relevant person.

Learners could observe the reception areas of different establishments, including the centre's own, and gain an awareness of the types of visitors they receive. Learners could work in small groups with each group researching a different organisation and the types of visitor they have. The findings could be presented to the whole group for discussion.

Visits to different organisations need to take place for learners to see how people on reception deal with customers. While politeness is always needed, a reception in an office will have different types of customers for example, offices, builders' merchants. A warehouse, for example, would have a lot of visiting salespeople. Discussion should take place back at the centre of what has been observed before any role-play exercises take place. Videos of learners practising role play would help point out good and bad practice. Learners also need to be made aware of differing organisational procedures.

Learners could role play greeting visitors to practise the required communication skills. Learners could work in pairs to role play different types of visitor and the receptionist. It is important that learners understand that the receptionist represents the public face of the organisation and must always present a positive image to visitors, as well as to staff in the organisation.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Group discussion – what types of visitor might an organisation have? For example, at the centre reception there may be learners wanting information, learners from different campuses, members of the public wanting information, people from other organisations meeting with members of staff, postal deliveries etc.

Guest speaker, e.g. centre receptionist, to talk about organisational procedures and why it is important to follow them when dealing with visitors, the types of questions visitors ask, how to make visitors feel welcome. Learners to prepare questions in advance to ask the guest speaker.

Learners to compile a checklist of good practice when dealing with visitors.

Tutor-led discussion on tone and language, including body language. Learners watch a DVD or tutor demonstrates appropriate and inappropriate tone, language and body language.

Tutor-led discussion on how treating visitors politely and positively benefits the organisation.

Role-play exercises – learners practise welcoming visitors. Peer feedback on how well the learner dealt with the visitor.

## Topic and suggested assignments/activities (continued)

Assessment – learners are observed either in role play, work placement or a model office or reception:

- welcoming a visitor and establishing the purpose of the visit
- following organisational procedures such as asking visitors to sign in and issuing visitor passes
- answering routine questions such as where facilities are, how long they will have to wait
- making the visitor feel welcome, e.g. offering somewhere to sit and a drink if appropriate
- using appropriate tone and language (learning outcome 1).

Assessment – learners to record how treating visitors politely and in a positive way benefits the organisation for future reference (learning outcome 2).

Assessment feedback, review and evaluation of unit.

### Assessment

Most of the assessment criteria for learning outcome 1 could be evidenced through role-play scenarios, with evidence taking the form of witness statements or observation reports completed and signed by the tutor.

To achieve assessment criterion 1.1, learners must demonstrate welcoming a visitor in an appropriate manner and asking simple questions to establish the purpose of the visit.

To achieve 1.2, learners must demonstrate that they can follow at least two types of organisational procedure when welcoming visitors, for example contacting the correct person in the organisation and ensuring that visitors sign the visitor book.

To achieve 1.3, learners need to answer at least two routine questions correctly and clearly.

To achieve 1.4, learners need to ensure that the visitor feels welcome during a period of waiting, such as offering a place to sit or tea, coffee.

To achieve 1.5, learners must be observed using appropriate tone, language and body language while dealing with the visitor.

Criterion 2.1 can be achieved through group discussions or through a one-to-one discussion or question and answer session with the tutor. Alternatively, it could be evidenced through a written statement. Learners should give at least one benefit for the organisation of treating visitors positively and politely.

## Suggested resources

### Books

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

### Websites

<a href="http://www.skillsca.org">www.skillsca.org</a>	The Council for Administration
<a href="http://www.chalkface.com">www.chalkface.com</a>	Worksheets on practical communication skills for the workplace
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive - information on health and safety in the workplace

## **Unit 20: Handling Mail**

**Unit reference number: A/502/4008**

**Level: 1**

**Credit value: 2**

**Guided learning hours: 20**

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### **Unit aim**

This unit aims to enable learners to develop skills in handling mail and aspects associated with it.

### **Unit introduction**

In this unit, learners will gain an understanding of how to handle mail efficiently and why this is important for an organisation. It is important for those working in administrative roles to have a good understanding of how to handle mail to ensure the flow of communication meets an organisation's administrative needs.

In the first part of the unit, learners will develop a knowledge of the benefits for an organisation of efficient mail distribution, and of the negative impact of inaccuracies or delays. They will also learn about procedures for dealing with confidential post.

In the second part of the unit, learners will have the opportunity to carry out mail-related tasks, such as sorting and distributing incoming mail, collecting, sorting and despatching outgoing mail and considering how to deal with damaged or suspicious items.

### **Essential resources**

Visits to local organisations should be encouraged and guest speakers will add currency and vocational relevance to the topic.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know why it is important for a business to handle mail efficiently and securely	1.1	State how efficient distribution of mail benefits a business	<ul style="list-style-type: none"> <li>□ <i>Benefits of efficient distribution</i>: smooth flow of information; information reaches correct person to be dealt with, e.g. customer queries, complaints, booking forms, invoices, payment; types of post, e.g. internal, external, letters, invoices, packages of supplies</li> </ul>
		1.2	State why inaccuracies or delays can have a negative impact	<ul style="list-style-type: none"> <li>□ <i>Negative impact of inaccuracies or delays</i>: types of impact, e.g. information not received by correct person, information is received late so deadlines are missed, supplies, invoices or payments are not received or are received late, can lead to customer complaints and damage the organisation's reputation</li> </ul>
		1.3	Identify procedures to protect confidential information	<ul style="list-style-type: none"> <li>□ <i>Confidentiality</i>: types of confidential information, e.g. customer or employee details, information sensitive to organisation; procedures, e.g. label post 'confidential' or 'personal', ensure that post marked confidential is not opened before delivery; ensuring confidential post is delivered correctly; using special envelopes for confidential post; using particular postal service, e.g. recorded delivery, special delivery, courier service</li> </ul>
2	Be able to deal with incoming mail	2.1	Sort incoming mail appropriately	<ul style="list-style-type: none"> <li>□ <i>Sorting</i>: sorting post according to different offices, departments, teams, individuals</li> </ul>
		2.2	State how to deal with suspicious or damaged items	<ul style="list-style-type: none"> <li>□ <i>Suspicious or damaged items</i>: knowing when an item is suspicious or damaged; knowing who to report to; checking with sender; checking with receiver; recording damaged or suspicious items</li> </ul>
		2.3	Distribute incoming mail accurately and to a given deadline	<ul style="list-style-type: none"> <li>□ <i>Distributing</i>: ensuring post is delivered to correct person; ensuring post is left in the correct place; delivering post at set times of day</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to deal with outgoing mail	3.1	Collect and sort outgoing mail accurately and on time	<ul style="list-style-type: none"> <li>□ <i>Collecting</i>: collecting post at set times; identifying post to be collected</li> </ul>
		3.2	Dispatch outgoing mail on time	<ul style="list-style-type: none"> <li>□ <i>Despatching</i>: types of services, e.g. special delivery, overnight post; different providers, e.g. Royal Mail, DHL; identifying best options, e.g. checking if mail is urgent, size of package; packaging items, e.g. size, sealing securely; ensuring post is clearly and accurately addressed; completing documentation, e.g. special delivery labels, supplier-related forms</li> </ul>

## Information for tutors

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### Delivery

This is essentially a practical unit. Learners will need the opportunity to develop and practise the administrative skills needed to collect, sort and distribute mail.

Visits need to be arranged to different organisations, for example one with a mailroom, one where mail is dealt with on reception.

Learners could observe the mailroom, or mail procedures, of different organisations, including the centre, and be aware of the types of task undertaken. Learners could work in small groups with each group researching a different organisation. The findings could be presented to the rest of the group for discussion.

Learners can discuss the types of problems they might encounter when delivering or collecting items and prepare a poster of how these could be dealt with. Learners should practise securing packages correctly and will need access to the relevant materials. Learners can discuss the types of deliveries and collections made in an organisation. They can then work in small groups to discuss the security measures that need to be in place when handling post with regard to confidentiality and damaged or suspicious items. A guest speaker could provide useful information regarding aspects of confidentiality and security.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion – what type of mail might a business receive? What might it send?

In small groups, learners discuss how efficient distribution of mail benefits a business and what would happen if there are inaccuracies or delays. Learners to record thoughts on a flip chart and feed back to the rest of the group.

Tutor-led delivery on the importance to businesses of handling mail efficiently and securely to underpin learner knowledge.

Assessment – learners to have a one-to-one discussion with the tutor and to state at least two benefits of the efficient distribution of mail to business, and at least two effects of inaccuracies and delays (learning outcome 1).

Assessment – learners complete a checklist of procedures for dealing with confidential information for future reference (learning outcome 1).

Visiting from speaker who works in the post-room of an organisation to discuss procedures for sorting and distributing mail and dealing with suspicious or damaged items. Learners to prepare questions in advance.

In small groups, with materials and timelines supplied by the tutor, learners to practise sorting and distributing incoming post and sorting and despatching outgoing post, choosing the most appropriate postal service.

Assessment – learners to be observed sorting and distributing incoming post and collecting, sorting and despatching outgoing post according to agreed timelines (learning outcome 2 and 3).

## Topic and suggested assignments/activities (continued)

Assessment – learners produce a checklist of procedures for dealing with damaged or suspicious items for future reference (learning outcome 2).

Assessment feedback, review and evaluation of unit.

### Assessment

Assessment criteria 1.1, 1.2 and 1.3 can be achieved through group discussions or through one-to-one or question and answer sessions with the tutor. Alternatively, learners could produce short written statements, perhaps by completing a pro forma.

To achieve 1.1, learners will need to state two ways in which the efficient distribution of mail can benefit a business. 'Efficient' means mail is delivered on time and to the correct person. For 1.2, learners should then state two negative effects of inaccuracies or delays. To achieve 1.3, learners need to identify two procedures for protecting confidential information.

Assessment criteria 2.1, 2.3, 3.1 and 3.2 can be assessed through practical activities and it would be helpful if learners had access to a model post-room or office and materials for packaging post.

Assessment criteria 2.1 and 2.3 can be achieved through sorting and distributing post correctly within a given timescale. Learners should be observed by a tutor and this observation should be taped or recorded observation on a witness statement.

Assessment criterion 2.2 can be achieved through a question and answer session and learners need to state two procedures relating to how to deal with damaged or suspicious items. This must be assessed through tutor observation.

To achieve 3.1 learners must be observed collecting and sorting outgoing mail accurately within a given timescale. To achieve 3.2, learners must despatch two different types of mail in a given timescale, choosing the most appropriate method of despatch and preparing the mail appropriately, for example for urgent or special delivery.

Any witness statements or observation records should be retained for verification purposes.

### Suggested resources

#### Books

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

#### Websites

[www.hse.gov.uk](http://www.hse.gov.uk) Health and Safety Executive - information on health and safety in the workplace

[www.skillsfca.org](http://www.skillsfca.org) The Council for Administration

# **Unit 21:** **Creating Business Documents**

**Unit reference number:** K/502/4005

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 30

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## **Unit aim**

The aim of this unit is for learners to develop the skills to identify and produce a variety of business documents.

## **Unit introduction**

This unit introduces learners to the types of documents used in business administration. It is essential that learners who wish to work in business administration are able to understand the types and purpose of common business documents. The range of documents included in the unit content reflect those most commonly used in a business organisation.

Learners will develop a knowledge of why organisations use templates and house style and also of when to use formal and informal communication styles.

They will then produce routine business documents using the correct format and style.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know that there are different types of business document	1.1	Identify different types of business document and when they might be used	<ul style="list-style-type: none"> <li>□ <i>Business documents</i>: types of business document, e.g. letter, memo, notice, notes, agenda, minutes, reports, order forms, delivery notes, invoices, promotional flyers, emails, faxes</li> <li>□ <i>Purpose</i>: to request information; to provide information; to give instructions; to attract potential customers; to confirm agreements</li> </ul>
		1.2	State why templates are used for some business documents	<ul style="list-style-type: none"> <li>□ <i>Templates</i>: to ensure consistency, e.g. in layout, in information given; to ensure clarity</li> </ul>
2	Know why it is important to use the right communication style in business documents	2.1	Give examples of when to use a formal or informal communication style	<ul style="list-style-type: none"> <li>□ <i>Formal</i>: when to use, e.g. when contacting external customers, senior managers, company wide communications; situations, e.g. replying to customer queries, when confirming payment</li> <li>□ <i>Informal</i>: when to use, e.g. peers, team members; situations, e.g. when arranging a team meal</li> </ul>
		2.2	State why some businesses adopt a 'house style' for certain documents	<ul style="list-style-type: none"> <li>□ <i>House style</i>: purpose, e.g. to encourage consistency in layout, to reflect company image, to look professional</li> </ul>
3	Be able to produce routine business documents	3.1	Produce routine business documents using the appropriate communication style	<ul style="list-style-type: none"> <li>□ <i>Produce documents</i>: using correct spelling, grammar, punctuation; appropriate greeting; complimentary close; clear structure and format; appropriate</li> <li>□ <i>Communication style</i>: choosing style according to the purpose of the document; formal; informal</li> </ul>
		3.2	Check documents for accuracy	<ul style="list-style-type: none"> <li>□ <i>Accuracy</i>: ensuring document includes correct information; clarity; spelling; grammar; punctuation; proofreading for accuracy; checking clarity and accuracy with supervisor</li> </ul>

## Information for tutors

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### Delivery

This is essentially a practical unit. Learners will need the opportunity to develop and practise the skills required to produce business documents. Tutor input will be needed to explain the format of letters, memos and other standard documents. Examples of standard documentation used in business should be available for learners. Learners can work in groups, with each group researching and collecting different documents for a different purpose (as listed in the unit content). They could present their findings to the rest of the group and describe the purpose of each document.

The importance of producing well-presented and accurate business documents needs to be stressed, as this is the professional image of the organisation. Learners should have the opportunity to produce different documents using different styles and layouts. Learners will need to check their own work for spelling, grammar and punctuation. They could check each other's work and also complete activities identifying errors and correcting them.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
Introduction to unit and structure of the programme of learning. Tutor to supply learners with examples of routine business documents. In small groups, learners discuss the format of the business documents and identify the purpose of each. Whole class discussion on the format and purpose of different business documents and why templates are used for some documents. Assessment – learners to complete a grid identifying common business documents, when they might be used and why a template may be used for some documents (learning outcome 1).
Tutor-led discussion on formal and informal communication styles. Exercise – tutor to give learners example documents in different styles, and learners to identify which style. Exercise – learners practise writing short documents in formal and informal styles. Tutor-led discussion on house style and why businesses use this, with examples. Exercise – learners practise writing documents according to a given house style. Assessment – learners to complete a grid identifying when formal or informal communication styles should be used (learning outcome 2). Tutor-led discussion on the importance of checking documents for accuracy. Learners to create a checklist for checking documents. Assessment – learners to produce three routine business documents, including one in a formal and one in an informal style. Learners to check documents for accuracy using their checklist (learning outcome 3).
Assessment feedback, review and evaluation of unit.

## Assessment

To achieve assessment criterion 1.1, learners need to identify which business documents would be used for which purpose. Evidence may be a written list of business documents identifying at least one purpose for each type of document. To achieve 1.2 learners need to state why templates are used for some business documents. This can be evidenced through a verbal response or could be added to the list of business documents.

To achieve 2.1, learners must give at least two examples of situations where a formal communication style should be used and at least two examples of when an informal communication style should be used. To achieve 2.2, learners should give at least two reasons why businesses adopt a house style. This can be evidenced through a question and answer session with the tutor, or through written responses.

To achieve 3.1, learners must produce at least two different types of routine business documents. To achieve 3.2, learners will need to check their documents for accuracy. A checklist giving a clear indication that the learner has checked the document for clarity, grammar, spelling and punctuation could be used as evidence.

## Suggested resources

### Books

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

### Websites

<a href="http://www.bbc.co.uk/skillswise/words/writing">www.bbc.co.uk/skillswise/words/writing</a>	Advice and worksheets for improving writing skills
<a href="http://www.microsoft.com/atwork/getworkdone">www.microsoft.com/atwork/getworkdone</a>	Microsoft advice on how to construct written documents
<a href="http://www.skillsca.org">www.skillsca.org</a>	The Council for Administration



# Unit 22: Recording Business Transactions

**Unit reference number:** J/501/7238

**Level:** 1

**Credit value:** 4

**Guided learning hours:** 30

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## Unit aim

This unit introduces learners to the types of documents used in business administration to record business transactions.

## Unit introduction

A range of documents are used within business administration including receipts, delivery notes and invoices. This unit will help the learner understand the types of documents used in business administration to record business transactions and their purpose. It is likely that those employed in junior administrative roles will have some responsibility for ordering and receiving office supplies, and it is important that they recognise and complete the relevant documents accurately.

It may be necessary for learners to participate in role play or scenarios to demonstrate their knowledge and understanding of learning outcome 2.

## Essential resources

Centres need access to resources to support learners in developing and practising their skills when recording financial transactions. Examples of all documents outlined in the unit content should be provided, and learners should have access to office supplies catalogues, both paper-based and through websites.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know the documents used to record business transactions	1.1	Identify the types and purpose of documents used to record business transactions	<ul style="list-style-type: none"> <li>□ <i>Documents recording buying and selling of goods:</i> purchase orders, delivery notes, goods received notes, invoices, credit notes, remittance advice slips, cheques, receipts</li> <li>□ <i>Petty cash:</i> types of things bought with petty cash, e.g. small items of equipment, stamps, refreshments; documentation for accounting for petty cash, e.g. receipts, recording purchases; following procedures</li> </ul>
2	Be able to complete an order form for office supplies	2.1	Make plans to order appropriate supplies for a given situation	<ul style="list-style-type: none"> <li>□ <i>Complete order forms:</i> get clear instructions; use price lists and catalogues; research sources of supply; complete order form; calculate price, calculate discounts; follow procedures, e.g. authorisation; preferred suppliers; retaining copy documents; efficient use of orders; check delivery dates</li> </ul>
		2.2	Accurately complete a purchase order form	
		2.3	Receive the supplies and delivery notes	
		2.4	Receive the invoice from the suppliers	
		2.5	Make out the cheque to pay the invoice	
		2.6	Receive the supplier's receipt for payment of the invoice	<ul style="list-style-type: none"> <li>□ <i>Receive goods:</i> procedures, e.g. checking delivery notes, checking invoice, procedures for payment, filling out cheque, having cheque signed, sending cheque to supplier, receiving and checking receipt</li> </ul>

## Information for tutors

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### Delivery

Delivery of this unit should be through practical tasks such as completing order forms. When investigating business documents used for buying and selling, learners need to develop practical skills and should be encouraged to practise completing documents in group exercises, preferably for a buying scenario. This should help learners to understand and experience how real businesses use these documents. A guest speaker would be useful to cover the importance of keeping financial records. Learners must be able to recognise the documents listed in the unit content. They should also understand the simple sequencing of these documents. The sequencing will follow the most common conventions of business practice, for example:

- petty cash voucher → cash payment → receipt
- purchase order → delivery note → invoice → cheque → receipt.

Learners will be expected to know the basic purpose of the document. They will need to understand the need for accuracy when completing purchase order forms.

When examining the process for ordering office goods and supplies, tutors could use the centre's own procedures as an example. Learners could investigate procedures in a local business, or a guest speaker could explain how these work in their organisation. Tutors should provide plenty of practical exercises to develop numerical skills through completing orders.

In all situations, learners must be aware of the use of the documents produced and understand the need to consider aspects such as language and choice of images appropriate to the reader.

### Outline learning plan

The outline learning plan has been included in this unit as guidance.

#### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion on a range of documents used to record business transactions and the purpose of the different records.

Activity – learners to undertake card matching activity to match the correct recording document to the purpose.

Guest speaker from the finance department of the centre or a local business explains the types of records kept. Learners to prepare and ask questions about the importance of this information.

Follow up by small group discussion to identify key points.

In pairs, learners to role-play scenarios and to practise completing records and using number skills.

Activity – learners to place financial documents in order, to show understanding of the sequencing of the recording documents (e.g. petty cash voucher – cash payment – receipt).

Assessment – learners to be given a series of documents by the tutor. Learners to identify each type of document and the purpose of each document by completing a grid (learning outcome 1).

## Topic and suggested assignments/activities (continued)

Guest speaker from a college explains the procedure for ordering and receiving goods. Learners to prepare and ask questions about the importance of following procedures.

Follow up with small group discussion to identify key points.

Role-play with peer observation – practical exercises to complete orders.

Assessment – learner to order office supplies through:

- accurate completion of purchase order form
- receiving goods and checking supplies and delivery notes
- receipt of invoice from suppliers
- accurate completion of cheque to pay invoice
- receiving supplier's receipt for payment of invoice.

The sequencing of the documentation can be recorded on a checklist or grid (learning outcome 2).

Assessment feedback, review and evaluation of unit.

### Assessment

To meet 1.1, learners need to be able to identify the purpose of each document. Evidence may be a written list of business documents, identifying at least one purpose for each type of document matched appropriately to a given situation.

Assessment criteria 2.1-2.6 require learners to order office supplies and complete the appropriate documentation according to instructions. Evidence is likely to be in the form of a collection of documents showing sources of supply, an accurately completed order form showing calculations, goods received note, invoice, cheque and receipt. Tutors can check learner understanding of following administrative procedures and using approved suppliers through oral questioning.

### Suggested resources

#### Books

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

#### Websites

[www.bbc.co.uk/skillwise/numbers/measuring/money](http://www.bbc.co.uk/skillwise/numbers/measuring/money)

BBC Skillswise – factsheets, worksheets and quizzes to improve money skills

[www.skillsca.org](http://www.skillsca.org)

The Council for Administration

# Unit 23: Supporting Business Meetings

**Unit reference number:** F/501/7240

**Level:** 1

**Credit value:** 4

**Guided learning hours:** 30

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## Unit aim

This unit focuses on providing support for a business meeting. Learners will be introduced to the tasks involved in preparing documentation and will learn the requirements for supporting meetings successfully. Learners will need to be aware of the requirements for different types of meetings, such as internal meetings and meetings involving people from outside the organisation.

As this will involve working with others, learners will need to be aware of behaviour appropriate to the formality of the meeting and the participants.

## Unit introduction

Administrative staff are often involved in the setting up of business meetings and then supporting the actual meeting. Learners need to understand the processes involved in setting up a meeting including inviting delegates, booking venues and refreshments, ensuring relevant documentation is available etc. Learners also need to know their role in supporting the meeting for example ensuring the meeting room is laid out in accordance with the chair's requirements, making notes, ensuring delegate needs are met. The final outcome focuses on follow up activities which may include sending notes to delegates, action points etc.

Where possible, learners should be given the opportunity to observe different types of meetings to gain an understanding of how personnel support meetings. Learners could also have the opportunity to participate in role play to practise the skills required.

## Essential resources

Centres need access to a suitable meeting room with facilities for learners to practise and develop their meeting support skills. This may be the classroom, meeting rooms at the centre or through a visit to a local business. Role play and simulations provide valuable opportunities for learners to practise skills. Examples of action planning checklists would be useful. Guest speakers and attendance (even briefly) at different business meetings can provide a valuable input to support learning.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know what is required to hold a business meeting	1.1	List the requirements for holding a formal meeting	<ul style="list-style-type: none"> <li>□ <i>Requirements</i>: date of meeting; likely length of meeting; number of participants; location, e.g. in house, off site, number of rooms; size of room(s); resources to support the meeting, e.g. equipment, refreshments, documentation; participant list; supporting meeting organiser</li> <li>□ <i>Types of meeting</i>: formal, e.g. meeting involving people outside the organisation; informal, e.g. team briefing, staff training; location, e.g. in-house, off-site</li> </ul>
		1.2	Identify the types of documentation which support business meetings	<ul style="list-style-type: none"> <li>□ <i>Documentation</i>: agenda, records of previous meetings, e.g. minutes, other supporting documentation, notification to delegates, presentations</li> </ul>
2	Be able to set up a room for a meeting	2.1	Present a plan for setting up a room for a meeting	<ul style="list-style-type: none"> <li>□ <i>Setting up the room</i>: making up and setting out delegate packs; confirming refreshment availability, e.g. consumables, cups, timing of refreshments; equipment, e.g. flipchart and pens, data projector, power supply; temperature; lighting</li> </ul>
		2.2	Set up a room for a meeting	<ul style="list-style-type: none"> <li>□ <i>Order of performing tasks</i>: following instructions; order of tasks; completion of tasks to time</li> </ul>
3	Be able to support a meeting	3.1	Provide support at a meeting	<ul style="list-style-type: none"> <li>□ <i>Contribution</i>: welcoming delegates, e.g. signing in, providing name badges if appropriate; recording attendees and non-attendees; taking simple notes; serving refreshments</li> </ul>
		3.2	Take notes at a meeting showing the key action points agreed	<ul style="list-style-type: none"> <li>□ <i>Taking notes at meetings</i>: taking notes at meetings to practice note taking, providing back-up notes for minute taker at meeting, identifying key action points</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Be able to complete follow-up activities after a meeting	4.1	Clear a room after a meeting	<ul style="list-style-type: none"> <li>□ <i>Clearing a room</i>: timing, e.g. ready for next meeting, after participants have left; helping colleagues, e.g. taking papers and equipment back to office, awareness of the need of senior staff for privacy; tidying up, e.g. removal of waste, retaining confidential documents, identifying material for secure disposal; leaving room as you would expect to find it</li> </ul>
		4.2	Complete follow-up activities after a meeting	<ul style="list-style-type: none"> <li>□ <i>Follow-up activities</i>: having notes checked for accuracy; distributing documents after the meeting, e.g. notes/minutes, copies of slides, delegate lists</li> </ul>

## Information for tutors

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### Delivery

Delivery of this unit will focus on learners developing the practical skills involved in setting up, supporting and clearing up after a meeting. It would be useful for learners to investigate different types of meeting held in the centre to determine levels of formality and the types of procedures followed. The range of tasks involved in supporting meetings is varied and, initially, learners can be introduced to the practical requirements, such as booking venues and equipment, as well as other preparatory work including sending information to attendees and the organisation of resources. Learners can work in groups and visit a suitable local organisation to research the administrator's responsibilities for setting up the meeting room, complying with health and safety requirements and assisting delegates. Findings can be presented to the rest of the group for further discussion. Learners can work in groups to share experiences of attending meetings, listing the requirements for a successful meeting. Case study material may be helpful to learners as it could give them the opportunity to plan for a mock meeting. The use of role-play scenarios would give learners the opportunity to practise setting the room up for a meeting in class and also the opportunity for other learners to give feedback on the organisation of the meeting. At all times learners should be encouraged to give constructive and positive feedback. It would be useful to show learners video/DVD clips of meeting protocols and then let them discuss the types of planning problems that can happen and how these can be dealt with.

It is important for learners to practise note taking at meetings. However learners should not be expected to be the sole note taker at meetings, but to provide additional notes as a back-up, identifying key action points. The meetings can be informal.

Finally, in consolidating learning outcome 4, it would be beneficial for learners to practise clearing a room after a meeting. There are specific points to observe when clearing and vacating a meeting room, such as ensuring that the room is clean and tidy; that equipment and any forgotten personal belongings have been returned; that any relevant documentation is dealt with according to instructions; and that confidential material is not left behind. Tutors should raise the issue that sometimes senior staff may wish to continue discussions after the meeting, and therefore need privacy before the room is cleared. Learners could work in small groups to prepare a presentation or poster on the follow-up activities which should be completed after the meeting.



## Outline learning plan

The outline learning plan has been included in this unit as guidance.

### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion on different types of business meetings – why are meetings held? What are the different types of meetings that take place within the centre?

Learners to watch a DVD to observe a formal meeting, or if possible, to observe a formal meeting taking place in centre or a business.

Guest speaker, or speaker from centre to speak about the administrator's responsibilities for setting up a meeting room. Learners to prepare questions for the speaker.

Assessment – learners to produce a check list of requirements for setting up a formal meeting (learning outcome 1).

Tutor-led discussion on the range of documentation required to hold a meeting. What is the purpose of these documents?

Assessment – learners to complete a grid showing a list of documents required to hold a business meeting. Learners to state their purpose (learning outcome 1).

In small groups, learners to discuss the stages for setting up a room to hold a meeting.

In small groups, learners should practise setting the room up for a formal and an informal meeting, followed by peer assessment and tutor feedback.

Assessment – tutor to provide learner with a scenario for a business-related meeting e.g. a meeting to discuss a planned trip overseas for staff. Learner to prepare a written plan for setting up a room for a meeting, and then to set up the room according to the plan (learning outcome 2).

Role-play exercises – learners to practise welcoming delegates, taking a register, and offering refreshments to delegates.

Note-taking activity – in pairs, one learner must talk for one minute, while the other must take notes on the key points. The learners should then swap roles and repeat the exercise. They can then feedback to the group.

Tutor-led discussion on clearing a room and the activities to be carried out after a meeting. Why are these important?

In small groups, learners to prepare a checklist for clearing a room after a meeting.

Learners to prepare a poster to illustrate follow-up activities required after a meeting, including proofreading notes, preparing a distribution list, and providing delegates with a copy of slides/handouts from the meeting.

Assessment – in small groups, learners to role-play supporting a meeting. The learner should take brief notes listing those present at the meeting, and any action points agreed. Learners should then clear the room after the role-play activity, according to their checklist. Learners should check and prepare their notes in order to provide these to delegates, with a list of the delegates and any paperwork tabled at the meeting (learning outcome 3 and learning outcome 4).

If appropriate, learners could be assessed while supporting a suitable meeting in the centre, or in a local business.

Assessment feedback, review and evaluation of unit.

## Assessment

To meet 1.1, learners need to be able to show they know what is required to support a formal business meeting. Evidence could be a written list identifying the requirements for one formal meeting, or this criterion could be evidenced through oral questioning.

Assessment criterion 1.2 requires the learner to identify the documents used to support business meetings. Evidence may be a written list of documents identifying a purpose for each type of document. A pro forma could be used for this purpose. Alternatively, this criterion could be evidenced through oral questioning.

For 2.1 and 2.2, the learner needs to know the stages for setting up a room and demonstrate carrying out these tasks for one type of meeting. Ideally, this would be a real work-based meeting but, where this is not possible, the meeting could be based on a scenario given by the tutor with a clear business purpose. Evidence may be a written plan with a checklist of activities for setting up a room supported by an observation record confirming the learner can set up a room appropriately.

For 3.1, the learner should demonstrate providing appropriate support during the meeting. Evidence may be an observation report from the tutor confirming appropriate support was provided.

To meet 3.2, the learner should produce simple notes of the meeting. It is not expected that the learner will produce detailed minutes, but the notes should include those present and key action points agreed.

To meet 4.1, the learner needs to show they can follow instructions for clearing a room by undertaking specific administrative tasks and for the room to be ready for the next user. Evidence may be an observation report from the tutor confirming that the room was cleared appropriately.

Assessment criterion 4.2 could be assessed through small group discussion or one-to-one questioning by the tutor to establish that the learner knows the types of information which would be distributed to delegates after the meeting. All evidence must be available for both internal and external verification purposes.

## Suggested resources

### Books

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

### Websites

<a href="http://www.businessballs.com/meetings.htm">www.businessballs.com/meetings.htm</a>	Advice on running meetings
<a href="http://www.effectivemeetings.com/meetingplanning/agenda/agenda.asp">www.effectivemeetings.com/meetingplanning/agenda/agenda.asp</a>	Advice on planning for and running meetings, including writing an agenda
<a href="http://www.hse.gov">www.hse.gov</a>	Health and Safety Executive - information on health and safety in the workplace
<a href="http://www.meetings.org/meeting4.htm">www.meetings.org/meeting4.htm</a>	Information on meeting and conference venues
<a href="http://www.skillsca.org">www.skillsca.org</a>	The Council for Administration

# Unit 24: Carrying out an Individual Project

**Unit reference number:** K/504/9146

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 30

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## Unit aim

The aim of this unit is for learners to identify, research and discuss a project area related to their chosen vocational area, compiling all findings into a report.

## Unit introduction

This unit is about learners investigating an area that they are interested in, related to their chosen vocational area in business. It is expected that learners will choose an aspect of a business to research. They will be given the opportunity to choose their own focus for the project and then undertake the research needed to put together a report on this topic.

Learners will be able to choose from a range of topics within their chosen vocational area. They will be shown how to set aims for the project, so that they can really focus on relevant and interesting ideas. Learners will be able to undertake relevant research, accessing a range of information sources that will give them information about the project area.

Once learners have gathered together their research they will be shown how to relate all of this to the project aims they set themselves, and how to compile their work into a report, including all of the relevant sections.

This is a practical unit that is led by the learner and their interests. It enables them to develop skills that are essential for working in many sectors, including time management, self-discipline in keeping to deadlines that they set themselves and independent enquiry through the undertaking of research.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to select an appropriate project topic	1.1	Produce a proposal for a project related to chosen vocational area	<ul style="list-style-type: none"> <li>□ <i>Identification of project topic</i>: investigation into ideas for project, methods of ensuring that project is viable including availability of information and secondary research, methods of rejecting invalid project ideas; ideas for project, e.g. producing a business plan, developing a marketing plan for a product, researching into an area of a business</li> </ul>
		1.2	Set aims for the project	<ul style="list-style-type: none"> <li>□ <i>Setting aims</i>: identifying appropriate and achievable aims, ensuring aims are realistic, positive and negative examples of aims, SMART goal setting</li> </ul>
2	Be able to investigate the project area	2.1	Plan the project using appropriate methods of research	<ul style="list-style-type: none"> <li>□ <i>Project planning</i>: scheduling actions to achieve project; time-management skills, planning time for tasks and activities including prioritising most important activities and allocating an appropriate amount of time to carry them out; understanding that tasks and activities should be prioritised according to given daily objectives</li> </ul>
		2.2	Carry out research into the project area	<ul style="list-style-type: none"> <li>□ <i>Carrying out research</i>: methods of secondary research available, i.e. books, journals, reports, web-based research; methods used to ensure that the research is valid and appropriate to the project aim; primary research and methods that can be used including questionnaires, interviews and surveys; aspects to be considered if undertaking primary research i.e. confidentiality and appropriate behaviour</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to produce a project report	3.1	Present a project report including: <ul style="list-style-type: none"> <li>• introduction</li> <li>• aims</li> <li>• findings</li> <li>• discussion</li> <li>• conclusion</li> </ul>	<ul style="list-style-type: none"> <li>□ <i>Guidelines in structuring a report:</i> relevant sections of a report including title page, acknowledgements, abstract, methodology, findings, discussion and bibliography; use of pictures and graphs in a report; methods used to ensure aims are clearly met, importance of proof reading a report</li> </ul>

## Information for tutors

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### Delivery

This unit enables learners to integrate and apply knowledge from many other units across the specification. It is important that the research topic is of personal interest to the learner and that the learner possesses or acquires a knowledge and understanding of the topic and related areas.

Although a major part of the delivery focuses on the learner conducting their research project practically, the unit must be supported by theoretical input from the tutor. Learners must understand concepts related to the research proposal and design as well as research skills, techniques and methodologies before they can consider, explore and produce a valid research proposal. At the research proposal stage, the tutor may, if necessary, provide support to help shape the proposal and provide direction to the learner to ensure an original and valid research proposal is presented. A PowerPoint development of a poster or a video could be used as more creative methods of presenting their report.

The research proposal will require learners to adopt an investigative approach and will include a statement of the area of research and background factors related to it. Tutors should direct learners to consider at this stage 'Why is the proposed project worthwhile? Who would the results be useful to? What does the literature say? What would the project contribute to the chosen vocational area?

If support from the tutor is required at the research proposal stage, it must be provided in order to ensure the proposal and design are valid. Once the area to be investigated has been established by the learner and agreed with the tutor, the learner may commence their full research proposal. The learner will then be able to independently, or with support, move into their research project.

Possible research project titles include:

- produce a business plan
- develop a marketing plan for a product
- research into an area of a business.

## Outline learning plan

The outline learning plan has been included in this unit as guidance.

Topic and suggested assignments/activities
Introduction to unit and structure of programme of learning.
Tutor-led discussion on how to select appropriate topics for a project in chosen vocational area. Learners undertake investigation into possible project areas. Learners draft aims for the chosen project.
Learners prepare a project plan to ensure the project is completed. Learners investigate the research methods available. Learners undertake appropriate research into the business project. Learners examine research and how to discuss this within the project.
Learners identify sections required in a project report. Assessment - series of one-to-one meetings with tutor to discuss proposal and set aims, plan project and carry out research. Learners produce business report with sections indicated in criterion 3.1 (learning outcomes 1, 2 and 3). Review own performance and their completed project.
Assessment debrief and feedback.

## Assessment

To achieve 1.1 and 1.2, the learner must produce and set aims for a proposal for a project related to a chosen vocational area, in this case business administration. In order to do this successfully, the learners may or may not require support from the tutor. The amount of support that they require should not influence their success. The aims of the project should be clearly stated and should originate from the learner.

For 2.1 and 2.2, learners need to plan and carry out the research as detailed in their research project. They should be given the opportunity to carry out this research, and will require access to the necessary resources.

Assessment criterion 3.1 requires learners to gather information from their research and compile this into the report as described in the unit content and assessment criteria. It is important that learners produce a report that clearly introduces the project, showing how and why the aims had been set. The findings of the research will then be included in the report along with a discussion as to what learners have found out about the vocational area that they have researched. The final section of the report will define how the research has met the aims that learners set for themselves.

Learners may require support in setting of the aims and in the compilation of the report, which is appropriate for the tutor to provide.

# **Unit 25: Planning an Enterprise Activity**

**Unit reference number:** R/503/2857

**Level:** 1

**Credit value:** 1

**Guided learning hours:** 10

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## **Unit aim**

The aim of this unit is to give learners the skills and knowledge needed to plan an enterprise activity. Learners will generate ideas for products or services, and consider the roles and skills required, and the likely costs, as well as the promotional materials needed.

## **Unit introduction**

Enterprise activities offer opportunities to learn and develop the entrepreneurial characteristics of tenacity, independence, innovation, imagination, risk taking, creativity, intuition and leadership. The focus of this unit is for learners to develop an understanding of how to set up an enterprise activity to sell a product or service, including the costs and responsibilities involved. Learners will also consider the skills required for the enterprise activity and how to promote the activity.

## **Essential resources**

There are no special resources needed for this unit.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to select a suitable enterprise activity	1.1	Identify strengths of ideas generated for an enterprise activity	<ul style="list-style-type: none"> <li>□ <i>Strengths and weaknesses of enterprise activity ideas:</i> availability and cost of resources, e.g. human and financial resources, materials, facilities, equipment, timescales, specific skills and knowledge required, potential demand for product or service, potential competition</li> </ul>
		1.2	Identify weaknesses of ideas generated for an enterprise activity	
2	Know appropriate roles and skills required for the enterprise activity	2.1	Identify roles required for the enterprise activity	<ul style="list-style-type: none"> <li>□ <i>Roles required:</i> e.g. planner, salesperson, manufacturer, administrator, financial controller</li> </ul>
		2.2	Identify the practical and personal skills required for the enterprise activity	<ul style="list-style-type: none"> <li>□ <i>Practical and personal skills required:</i> planning skills, budgeting and financial skills, manufacturing skills, communication, confidence, knowledge of product or service, customer service skills, promotional and selling skills</li> </ul>
3	Know the costs involved in producing and selling a product or service	3.1	Identify the cost of items and processes related to producing and selling the product or service	<ul style="list-style-type: none"> <li>□ <i>Production costs:</i> ingredients, components, equipment, facilities, skills, time</li> <li>□ <i>Selling costs:</i> advertising, printing of leaflets or flyers, facilities, e.g. hire of stall at charity event or local market</li> </ul>
		3.2	Identify the final pricing of the product or service using basic calculations	<ul style="list-style-type: none"> <li>□ <i>Pricing of the product or service:</i> realistic pricing; covering costs and making a profit</li> </ul>
4	Be able to use an appropriate promotional technique	4.1	Use an appropriate method to promote a product or service	<ul style="list-style-type: none"> <li>□ <i>Promotional materials and methods:</i> selection of relevant media for promotion, e.g. poster, leaflet, flyer, launch event; using a logo or branding; using pricing strategies, e.g. special introductory discount; conveying information about product or service in a way that is clear, accurate and attractive, e.g. information about location, availability, contact information, features of product or service</li> </ul>

## Information for tutors

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### Delivery

This unit has been designed to be as practical as possible. Learners should be encouraged to gain an understanding of the relevant enterprise concepts in an applied way. Group working and group discussion would be appropriate, even where the learner's own assessment evidence needs to be recorded separately.

An enterprise activity does not have to be a large-scale activity. It can either be producing a product, for example greeting cards, baking biscuits, making sweets, making jewellery, or providing a service such as selling ice cream or carwashing. During the delivery of this unit, learners should be given as much practical experience as possible.

This unit has been designed so that it can be delivered with *Unit 26: Running an Enterprise Activity*.

To introduce the unit, tutors could stimulate discussion as to what is needed for a successful enterprise activity and, through the discussion, ideas could be generated regarding different types of products and services. It is important to emphasise that the activity must be possible within the learner's current skills. These ideas could be explored individually or through group activity.

A question and answer session could determine the strengths and weaknesses of different enterprise ideas. The advantages and disadvantages of ideas could also be explored through the form of a 'Dragons' Den' type presentation to a group, with peers commenting on the ideas.

Group discussion could be used to explore roles within an enterprise activity and the personal skills involved. Learners could also interview business people or consult entrepreneur websites for ideas on the kind of roles and skills needed for different types of enterprise activities.

In order for learners to understand the importance of promotional techniques and selling skills, it would be useful for them to watch clips of TV adverts and/or review advertising from a range of sources such as the internet, radio, newspapers and magazines. Point of sale advertising could be a useful resource which is also readily available. Specific information on selling skills could be gained from a range of services including books, internet and media articles. Personal skills in enterprise could be observed through TV documentaries on business start-ups and TV programmes such as *Dragons' Den*.

Learners could investigate costs of their chosen enterprise idea by active research via the internet or interaction with possible suppliers. Setting prices could be a result of research (such as questionnaires or a small-scale focus discussion), exploring what prices customers are prepared to pay for a product or service. Business people could also be interviewed for advice on how to set a realistic profit margin.

To complete this unit, learners could explore and research a variety of advertising media and promotional events as they decide on the appropriate promotion materials for their enterprise activity.

## Assessment

This unit can be assessed through a series of structured tasks or activities including a mixture of theory-based and practical application.

For 1.1 and 1.2, the learner should be given the opportunity to discuss possible ideas for an enterprise activity before deciding on the strengths and weaknesses of the ideas. This could be part of a group discussion with a tutor or take place as an individual activity. The learner must identify more than one type of product or service before choosing one enterprise idea to pursue further in this unit. To achieve 1.1 and 1.2, the learner needs to identify at least one strength and one weakness in two different enterprise ideas.

To achieve 2.1 and 2.2, the learner needs to identify the different key roles for their enterprise activity. These could include examples such as the role of researcher, promoter, salesperson and keeping financial records. Additionally, the learner must be able to identify practical and personal skills that would be required in the enterprise activity.

To achieve 3.1, the learner needs to identify a range of costs, and processes related to producing and selling, their product or service. This could be presented as a brief poster or a written presentation.

To achieve 3.2, the learner is required to use basic calculations to show how they will work out the final sale price for their product or service. This could be included as part of the poster or the presentation produced for 3.1.

For 4.1, the learner must produce some promotional material for their product or service such as a flyer or poster which contains key information. This information should include an accurate description of the product or service, logo or branding, price, location and availability of the product or service and/or contact information.

## Suggested resources

### Websites

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

[www.enterprise-education.org.uk](http://www.enterprise-education.org.uk)

[www.enterpriseinschools.org.uk/enterpriseinschools/index.php](http://www.enterpriseinschools.org.uk/enterpriseinschools/index.php)

[www.makeyourmark.org.uk](http://www.makeyourmark.org.uk)

[www.speakeasydragons.com](http://www.speakeasydragons.com)

[www.stridingout.co.uk](http://www.stridingout.co.uk)

[www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation](http://www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation)

# Unit 26: Running an Enterprise Activity

**Unit code:** Y/503/2858

**Level:** Level 1

**Credit value:** 1

**Guided learning hours:** 10

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## Unit aim

This unit gives learners the opportunity to use their skills and knowledge to run an enterprise activity. Learners will gain practical experience of choosing a venue, products, marketing and setting prices in relation to costs.

## Unit introduction

Enterprise activities offer opportunities to learn and develop the entrepreneurial characteristics of tenacity, independence, innovation, imagination, risk taking, creativity, intuition and leadership. The focus of this unit is to provide learners with the opportunity to carry out an enterprise activity. Learners will demonstrate selling a product or service, taking into account the practical and personal skills required. Learners will also develop an understanding of how to increase the chances of success in an enterprise activity and how to evaluate its performance.

## Essential resources

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to increase the likelihood of success in an enterprise activity	1.1	Identify features which would lead to the effective delivery of a chosen enterprise activity	<ul style="list-style-type: none"> <li>□ <i>Features leading to effective delivery:</i> identify customers and what customers want or need, conduct market research, estimate number of sales, plan tasks and timescales, allocate tasks and roles according to a plan, evaluate skills needed and who best able to provide them</li> </ul>
2	Be able to complete an enterprise activity	2.1	Prepare the product or service for the enterprise activity incorporating required features	<ul style="list-style-type: none"> <li>□ <i>Selling a product using practical and personal skills:</i> suitable product or service prepared; necessary components obtained; appropriate promotional materials produced and displayed; location prepared and enterprise activity set up; prices determined and displayed; sales and communication skills demonstrated, implementation and organisational skills demonstrated</li> </ul>
		2.2	Create appropriate advertising for the product or service	
		2.3	Set an appropriate price for the product or service offered	
		2.4	Demonstrate appropriate sales and communication skills	

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to review the success of the enterprise activity	3.1	Produce records to show the successes and failures of the enterprise activity	<ul style="list-style-type: none"> <li>□ <i>Producing records</i>: show cost of producing product or service; recording numbers of product or service sold; income before costs; profits/losses; evaluating success of enterprise activity in terms of number of sales and profit made/not made; reasons for success or failure, e.g. quality of the product, venue, cost, weather, advertising</li> </ul>
		3.2	State what would be done differently should there be another enterprise activity	

## Information for tutors

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### Delivery

This unit has been designed to be as practical as possible. Learners should be encouraged to gain an understanding of the relevant enterprise concepts in an applied way. Group working and group discussion would be appropriate, even where the learner's own assessment evidence needs to be recorded separately.

An enterprise activity does not have to be a large-scale activity. It can either be producing a product, for example greeting cards, baking biscuits, making sweets, making jewellery, or providing a service such as selling ice cream or carwashing. During the delivery of this unit, learners should be given as much practical experience as possible.

This unit has been designed so that it can be delivered with *Unit 25: Planning an Enterprise Activity*.

At this level, learner activities will require them to carry out some multi-stepped tasks. In the completion of tasks for this unit, learners should demonstrate appropriate planning and preparation skills. Additionally, the learner must be given the opportunity to show competency in organisational skills and skills in reviewing the success (or failure) of the enterprise activity. A learner in the workplace should be able to identify and use some work-related skills in running their enterprise activity.

Learners are likely to require clear guidance from their tutor or line manager in thinking about how to run their enterprise activity, but should aim to operate with less supervision than at Entry Level 3. Regular feedback will promote steady progress in the development of the required skills and knowledge. Learners will require supervisory guidance and regular monitoring and review of progress in order to identify the knowledge and skills that have been developed.

Learners might find it helpful to use group discussions to explore features that should ensure that their enterprise activity is successful. 'Successful' in this context means that the learner understands how to carry out their activity and reach their planned sales targets.

Group discussions may also be a useful way of helping learners understand the importance of consumer needs in influencing the success of an enterprise activity. Learners could also seek advice or opinions from visiting guest speakers or other business people about consumer demand and how the enterprise activity might meet consumer needs.

Group discussions could be used to come up with a checklist of tasks needed to carry out the activity on the day(s) chosen. The list of tasks could also be produced as an individual piece of written work or as a PowerPoint presentation.

The learner's enterprise activity could be delivered as part of an enterprise activity day using the format of a trade fair with a variety of stands. Alternatively, the enterprise activity could also take the form of a one-off, small group activity or an individual enterprise activity.

Learners could seek guidance from record-sheet templates that suggest the key financial information that need to be recorded to evaluate the overall successes and/or failures of the enterprise activity. Learners could also seek advice from entrepreneurs or business people regarding which financial information to record and how to present it. They could also participate in a question and answer session with a visiting speaker.

## Assessment

Assessment of this unit centres on the completion of an enterprise activity.

For 1.1, the learner must identify key features leading to the success of a chosen enterprise activity. This could be provided, for example, in a written report, a brief presentation, video evidence or completion of a log or record sheet. The number of key features would depend on the nature of the enterprise activity, but typically the learner should be able to discuss at least two key features for success.

For 2.1 to 2.4, the learner must provide witnessed evidence that the enterprise activity has taken place. The product or service must have been prepared incorporating the features specified in 1.1, the price and benefits of the product or service made clear, and appropriate sales and implementation skills must have been demonstrated by the learner. The prepared product or service may comprise something the learner has produced themselves (jewellery they have made), or something produced by someone else (ice cream purchased by the learner and sold on a stall at a trade fair). Photographic or video evidence can be used, as well as a tutor witness statement.

For 3.1, some simple records need to be provided, showing costs and revenue and a calculation of profit/loss made, providing a brief comment as to the reasons for success or failure of the enterprise activity. Record sheets provided by a tutor can be used for this purpose. For 3.2, the learner should state what would be done differently should there be another enterprise activity. Consideration could be given to the venue, time of the enterprise activity, the marketing, quality of the product or service, and the communication skills used.

## Suggested resources

### Websites

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

[www.enterprise-education.org.uk](http://www.enterprise-education.org.uk)

[www.enterpriseuk.org/](http://www.enterpriseuk.org/)

[www.stridingout.co.uk](http://www.stridingout.co.uk)



## Unit 27:

# Job Opportunities in Business Administration

**Unit reference number:** R/501/7243

**Level:** 1

**Credit value:** 4

**Guided learning hours:** 30

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### Unit aim

The principal aim of this unit is for learners to develop a plan for starting work in business administration by being given the opportunity to explore job opportunities across different areas of business. The learner will explore conditions of employment, and the qualifications and skills required for different jobs. The learner will have the opportunity to set realistic short-term and medium-term goals for their career pathway in business administration.

### Unit introduction

There are a wide range of job opportunities within business administration including work in small private businesses or large corporate companies. This unit gives the learner the opportunity to identify jobs in different sectors of business administration including supervisors, project officers, administrative support, for example mail room workers, and management. Learners will carry out research to identify different job roles using a range of methods including internet searches, reviewing information from media sources, inviting speakers to share their experiences, visiting organisations etc.

Learning outcome 2 focuses on the terms and conditions of employment within business administration. Learners will gain a general overview of working in this sector. Information will include working patterns, salaries and benefits.

Learners will then go on to find out the necessary skills and qualifications required for different jobs within the sector. Using this information the learner can then identify their own skills gaps and develop a plan to allow them to seek employment within business administration.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know about job opportunities in business administration	1.1	Identify jobs in different sectors of business administration	<ul style="list-style-type: none"> <li>□ <i>Job opportunities:</i> job opportunities in business administration, e.g., word processor operator, data inputter, mail room assistant, receptionist, team administrator, departmental administrator, personal assistant, team leader, supervisor, manager, project coordinator, meeting room coordinator, events coordinator</li> </ul>
		1.2	Describe the job roles in one functional area of business administration	<ul style="list-style-type: none"> <li>□ <i>Functional areas within business administration:</i> functional areas, e.g. finance, IT support, operations, marketing and sales, customer service, research and development, production, facilities</li> </ul>
2	Know about terms and conditions of employment within business administration	2.1	Describe the terms and conditions of employment within business administration	<ul style="list-style-type: none"> <li>□ <i>Work patterns:</i> hours of work, work patterns, shift work, e.g. early starts, late finishes, night work, weekend work, bank holiday work, irregular work pattern; flexitime, days off during week; annual leave</li> <li>□ <i>Pay:</i> e.g. hourly, weekly, monthly, salary scales, increments</li> <li>□ <i>Benefits:</i> types of benefit, e.g. pension, season ticket loans, bonus for overtime, uniform/clothing allowance, subsidised/free meals, training/professional development</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know about the qualifications and skills needed for jobs in business administration	3.1	Present information about the qualifications and skills required for selected jobs in business administration	<ul style="list-style-type: none"> <li>□ <i>Qualifications</i>: essential; desirable; general qualifications, e.g. GCSEs, GCEs; work-based qualifications, e.g. NVQs in Business and Administration, Customer Service, Management; vocational qualifications, e.g. BTEC Firsts/Nationals in Business; apprenticeships; skills qualifications, e.g. word processing/keyboarding, audio transcription, shorthand; practical qualifications, e.g. moving and lifting, first aid</li> <li>□ <i>Skills and qualities</i>: personal qualities, e.g. organising self, ability to interrelate with others; work-related skills, e.g. communication, teamwork, problem solving, self-management; level of fitness</li> </ul>
4	Be able to plan how to start work within business administration	4.1	Produce a plan to start work within business administration	<ul style="list-style-type: none"> <li>□ <i>Planning</i>: personal skills audit, own abilities; interests; values; personal qualities; lifestyle constraints</li> <li>□ <i>Finding out about jobs</i>: career pathways; experience requirements; methods, e.g. websites, Careers Fairs, journals, people, e.g. family, friends, tutor</li> <li>□ <i>Making plans</i>: considering options; realistic short-term goals, medium-term goals</li> </ul>

## Information for tutors

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### Delivery

Tutors delivering this unit have the opportunity to use a wide range of techniques including presentations, seminars, practical workshops, external trips and guest speakers. Additional learning resources can include journals, videos, DVDs, case studies, learner presentations and group work.

The tutor could start delivery of this unit by inviting guest speakers working in different jobs across the business administration sector. Learners could prepare questions to ask speakers about their job roles and conditions of employment.

Learners may be able to visit different business administration settings and interview or work shadow an employee. On return learners could create a leaflet to include information about the job role and conditions of employment which other learners could use as a factsheet.

Videos and case studies may be used to help learners understand the range of job roles in the sector.

In groups learners could complete web-based research into job roles in different settings and departments within business administration and then report back to the rest of the group.

For learning outcome 2, learners could work in groups and use the local and national press and the internet to find a variety of job adverts and list the terms and conditions associated such as work patterns, pay and benefits.

The opportunity to analyse real job descriptions, covering a wide range of jobs in business administration, would help learners to understand the similarities and differences between the work patterns, pay and benefits of different jobs in the sector.

Learners could be grouped with those who are interested in similar jobs to complete web-based research into the qualifications, skills and qualities required for their preferred jobs in the sector and then report back to the rest of the group. Learners may use PowerPoint or flipcharts to present this information.

The learners could access careers advice from Learndirect ([www.learndirect-advice.co.uk](http://www.learndirect-advice.co.uk)) to help them begin their career plan. The need for goal setting and the difference between long-term and short-term goals could be explored through a question and answer session.

Learners at this level may need support in completing a personal skills audit and identifying and setting long-term and short-term goals for themselves for learning outcome 4. This may be achieved through one-to-one discussions or tutorials.

## Outline learning plan

The outline learning plan has been included in this unit as guidance.

### Topic and suggested assignments/activities

Introduction to unit and structure of the programme of learning.

Tutor-led discussion on job opportunities in business and administration.

Small group research – learners select one of the above and gather information about the following:

- range of jobs
- working patterns
- pay
- benefits
- qualifications
- skills and qualities.

Research could involve the internet, visits to settings, professional journals.

Activity – group presentation of information to include a factsheet for other learners.

Activity – learners invite an employee from the chosen sector to share information about their job. Alternatively, learners may visit an appropriate work setting or talk to an employee to gather information.

Activity – using the information gathered from the group work on skills, qualities and qualifications, the individual learner carries out a personal skills audit, eg using a template or online assessment.

One-to-one tutorial to discuss opportunities in line with skills audit.

Assessment – using the information gathered from the activities outlined above, individual learners provide evidence for each of the assessment criteria within the unit (learning outcome 1, learning outcome 2, learning outcome 3, learning outcome 4).

Assessment feedback, review and evaluation of unit.

## Assessment

The criteria for this unit may be combined in one assignment task as a plan for starting work. This may take the form of a loose-leaf folder.

To meet 1.1, learners will need to identify different jobs within the business administration sector.

To meet 1.2, learners will need to select one business administration organisation and explain the different types of job role within it, for example receptionist, mail room assistant, customer service adviser.

To meet 2.1, learners could select at least two jobs within different organisations, and compare the work patterns and pay benefits. This could be presented in chart form.

For 3.1, learners will need to give details about the skills, qualities and qualifications required for three jobs within business administration. These could be the jobs selected for 2.1.

To produce the career plan for 4.1 the learner needs to undertake a personal skills audit and identify their interests. This could be recorded using a pro forma.

Learners will need to provide evidence of their research into possible jobs in business administration, this may be evidenced with leaflets, downloads from websites, documentation from tutorials/discussions with tutors or careers advisers. The career plan should identify one long-term goal and two short-term goals.

### **Suggested resources**

#### **Books**

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

#### **Websites**

<a href="http://www.bized.co.uk">www.bized.co.uk</a>	Business education resources
<a href="http://www.businessbritainuk.co.uk">www.businessbritainuk.co.uk</a>	Information about businesses in Britain and links to other businesses and business news sites
<a href="http://www.fsb.org.uk">www.fsb.org.uk</a>	The Federation of Small Business – information, support and guidance about small businesses in the UK

# Unit 28: Word Processing Software

**Unit reference number:** L/502/4627

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 20

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## Unit introduction

This unit is about the skills and knowledge required by an IT user to use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others.

Word processing tools and techniques will be described as 'basic' because:

- the software tools and functions will be predetermined or commonly used
- the techniques needed for text entry, manipulation and outputting will be straightforward or routine.

## Essential resources

Learners will need access to appropriate text processing software (Microsoft Word® or similar). In addition, learners must have access to either different types of information, for example graphic images, or to other sources of information.

Learners should also be given access to pre-prepared templates, tables and forms.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Enter, edit and combine text and other information accurately within word processing documents	1.1	Identify what types of information are needed in documents	<ul style="list-style-type: none"> <li>Types of information: e.g. text, numbers, images; other graphic, e.g. elements e.g. lines, borders</li> </ul>
		1.2	Identify what templates are available and when to use them	<ul style="list-style-type: none"> <li>Templates: e.g. agenda, memos, letters, faxes, brochures/leaflets, calendars</li> </ul>
		1.3	Use keyboard or other input method to enter or insert text and other information	<ul style="list-style-type: none"> <li>Input information: keyboard skills, e.g. use the full range of keys; type accurately and efficiently, keyboard shortcuts; other input methods, e.g. voice recognition, touch screen, stylus</li> </ul>
		1.4	Combine information of different types or from different sources within a document	<ul style="list-style-type: none"> <li>Combine information: e.g. insert, size, position, wrap, order and group, e.g. images, clip art, tables</li> </ul>
		1.5	Enter information into existing tables, forms and templates	



Learning outcomes		Assessment criteria	Unit amplification
		1.6 Use editing tools to amend document content	<ul style="list-style-type: none"> <li>□ <i>Editing techniques:</i> editing techniques appropriate to the type of information, e.g. select, copy, cut, paste, undo, redo, drag and drop, find, replace, insert, delete, size, crop, position</li> <li>□ <i>Store and retrieve files:</i> e.g. create, name, open, save, save as, find</li> </ul>
		1.7 Store and retrieve document files effectively, in line with local guidelines and conventions where available	
	Structure information within word processing documents	2.1 Create and modify tables to organise tabular or numeric information	<ul style="list-style-type: none"> <li>□ <i>Tables and forms:</i> add table; alter table structure, e.g. insert and delete rows and columns, adjust column width</li> </ul>
		2.2 Select and apply heading styles to text	
3	Use word processing software tools to format and present documents	3.1 Identify what formatting to use to enhance presentation of the document	<ul style="list-style-type: none"> <li>□ <i>Formatting:</i> paragraphs, e.g. alignment, bullets, numbering, line spacing, borders, shading; character, e.g. size, font style (typeface), colour, bold, underline, italic</li> </ul>
		3.2 Select and use appropriate techniques to format characters and paragraphs	<ul style="list-style-type: none"> <li>□ <i>Page layout:</i> e.g. size, orientation, margins, page numbers, date and time</li> </ul>
		3.3 Select and use appropriate page layout to present and print documents	<ul style="list-style-type: none"> <li>□ <i>Page layout for documents:</i> e.g. size, orientation, margins, columns, page breaks, page numbering; standard document layouts, e.g. letter, memo</li> </ul>
		3.4 Check documents meet needs, using IT tools and making corrections as necessary	<ul style="list-style-type: none"> <li>□ <i>Check word processed documents:</i> software tools, e.g. spellcheck, grammar check, print preview; other, e.g. font style and size, hyphenation, page layout, margins, line and page breaks, tables, accuracy, consistency</li> </ul>

## Information for tutors

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### Delivery

A practical approach to delivery is essential for this unit. Delivery should focus on both the format and the content of software as well as enabling learners to develop their technical knowledge and skills by using software tools and techniques. Much of the assessment evidence is likely to be produced during this process, and centres should consider what other supporting product evidence can be collected.

### Assessment

An holistic approach to teaching is suggested for this unit. Tutors should provide learners with a variety of scenarios, from which one should be selected. These scenarios should be of interest to the learners and should not be too ambitious but should enable them to meet all the assessment criteria. It is envisaged that only one scenario will be required in order for learners to fulfil what is needed to pass the unit.

Tutors should encourage learners to capture and record evidence as an ongoing process at each stage of development. Therefore, assessment evidence will primarily come in the form of printed annotated screenshots, highlighting the formatting and layout of work, where necessary. Evidence can also come in the form of observations, class discussions, peer assessment and written work.

To achieve a pass grade in this unit, learners will need to meet all the assessment criteria.

### Suggested resources

#### Websites

[www.bbc.co.uk/schools/gcsebitesize/ict](http://www.bbc.co.uk/schools/gcsebitesize/ict)

[www.teach-ict.com](http://www.teach-ict.com)

# Unit 29: Using the Internet

**Unit reference number:** T/502/4296

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 20

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## Unit introduction

This unit is about the skills and knowledge needed by the IT user to understand and use a connection method and basic internet software tools and techniques to search for and exchange information for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others.

Internet tools and techniques will be defined as 'basic' because:

- the software tools and functions will be predetermined or commonly used
- the range of techniques used for searching and exchanging information will be familiar or commonly undertaken.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example time available, audience needs, content, structure)
- the input and output of information will be predetermined by the person supervising the task.

## Essential resources

To deliver this unit centres will need to have a LAN with browser application software and access to the internet. Centres will need the facilities to enable learners to carry out the practical aspects of the unit as defined by the content and assessment criteria. Centres will also need a range of suitable software tools and equipment to support the cohort size undertaking the unit.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Connect to the internet	1.1	Identify different types of connection methods that can be used to access the internet	<ul style="list-style-type: none"> <li>□ <i>Connection methods:</i> e.g. local area network (LAN), virtual private network (VPN), mobile phone, modem, router, wireless, dial-up, broadband</li> </ul>
		1.2	Access the internet or intranet	<ul style="list-style-type: none"> <li>□ <i>Accessing the internet:</i> e.g. Internet Service Provider (ISP); username, password; hardware and software requirements</li> </ul>
2	Use browser software to navigate web pages	2.1	Use browser tools to navigate web pages	<ul style="list-style-type: none"> <li>□ <i>Browser tools:</i> e.g. go to, back, forward, refresh, stop, home, history, bookmark, new window, new tab, follow link; toolbars, e.g. search bar, address bar: Uniform Resource Locator (URL), menu bar</li> </ul>
		2.2	Identify when to change browser settings to aid navigation	
		2.3	Adjust browser settings to meet needs	<ul style="list-style-type: none"> <li>□ <i>Browser settings:</i> e.g. home page, autofill, security, pop-ups, appearance, privacy; search engine, toolbars, zoom, text size, accessibility</li> </ul>
		2.4	Use browser help facilities	<ul style="list-style-type: none"> <li>□ <i>Browser help facilities:</i> e.g. online support, user documentation</li> </ul>
3	Use browser tools to search for information from the internet	3.1	Select and use appropriate search techniques to locate information	<ul style="list-style-type: none"> <li>□ <i>Search techniques:</i> e.g. key words, quotation marks, search within results, relational operators +, -, 'find' or search tool, turn questions into key words for an online query</li> </ul>
		3.2	Outline how information meets requirements	<ul style="list-style-type: none"> <li>□ <i>Information requirements:</i> e.g. recognise intention and authority of provider, currency of the information, relevance, accuracy, bias, level of detail</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		3.3	Use references to make it easier to find information another time	<ul style="list-style-type: none"> <li>□ <i>References</i>: e.g. history, favourites, bookmarks; links; log useful sites, save web pages</li> </ul>
		3.4	Download and save different types of information from the internet	<ul style="list-style-type: none"> <li>□ <i>Download information</i>: e.g. web page, website; images, text, numbers, sound, games, video, TV, music</li> </ul>
4	Use browser software to communicate information online	4.1	Select and use tools and techniques to communicate information online	<ul style="list-style-type: none"> <li>□ <i>Communicate information</i>: saved information, e.g. podcasts, text, images; real-time information, e.g. blogs, instant messaging, social networking</li> </ul>
		4.2	Use browser tools to share information sources with others	<ul style="list-style-type: none"> <li>□ <i>Share information sources</i>: send, e.g. link, web page</li> </ul>
		4.3	Submit information online using forms or interactive sites	<ul style="list-style-type: none"> <li>□ <i>Submit information</i>: e.g. fill in and submit web forms; ratings, reviews, recommendations; wikis; discussion forums; interactive sites; netiquette</li> </ul>
		4.4	Identify opportunities to post or publish material to websites	

Learning outcomes		Assessment criteria		Unit amplification
5	Follow and understand the need for safety and security practices when working online	5.1	Identify the threats to user safety when working online	<ul style="list-style-type: none"> <li>□ <i>Threats to user safety:</i> e.g. abusive behaviour, 'cyberbullying', inappropriate behaviour and grooming; abuse of young people; false identities; financial deception, identity theft</li> </ul>
		5.2	Outline how to minimise internet security risks	<ul style="list-style-type: none"> <li>□ <i>Minimise risks:</i> software, e.g. virus checking, anti-spam, firewall, ad-ware; unknown sources, e.g. messages, files, software, attachments</li> </ul>
		5.3	Work responsibly and take appropriate safety and security precautions when working online	<ul style="list-style-type: none"> <li>□ <i>Safety precautions:</i> e.g. firewall settings, internet security settings; report inappropriate behaviour; report security threats or breaches; netiquette, content filtering, avoid inappropriate disclosure of information</li> </ul>
		5.4	Keep personal information secure	<ul style="list-style-type: none"> <li>□ <i>Information security:</i> e.g. username, password/PIN selection, online identity/profile; real name, pseudonym, avatar; personal information, e.g. to include, withhold, who can see the information</li> </ul>
		5.5	Follow relevant laws, guidelines and procedures for the use of the internet	<ul style="list-style-type: none"> <li>□ <i>Laws, guidelines and procedures:</i> set by employer or organisation, e.g. health and safety, security; laws, e.g. copyright laws, downloads, licensing</li> </ul>

## Information for tutors

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### Delivery

A practical approach to delivery is essential for this unit and should enable learners to develop their technical knowledge and skills. Much of the assessment evidence is likely to be produced during this process, and centres should consider what other supporting product evidence can be collected.

### Assessment

Where possible an holistic approach to teaching is suggested throughout this qualification. However, this unit is task based and could prove difficult to achieve over one set context. It is envisaged that this unit will be taught through various topic areas of interest to the learners.

Therefore, assessment evidence will primarily come in the form of observations although class discussions, peer assessment and other written work may be effective. It is advised that a log of evidence recorded against each assessment criterion is kept by the learners.

### Suggested resources

#### Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)  
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)  
ISBN 9781846909214

#### Websites

[www.bbc.co.uk/schools/teachers/](http://www.bbc.co.uk/schools/teachers/)  
[www.howstuffworks.com](http://www.howstuffworks.com)

# **Unit 30: Investigating Rights and Responsibilities at Work**

**Unit reference number: M/503/2879**

**Level: 2**

**Credit value: 1**

**Guided learning hours: 10**

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## **Unit aim**

This unit aims to develop learners' understanding of the importance of rights and responsibilities in the workplace and the responsibilities of employees and employers in upholding them.

## **Unit introduction**

Employees and employers have responsibilities to each other and should also expect their rights to be upheld. These rights and responsibilities relate to areas such as the provision of terms and conditions of employment, privacy of personal information, health and safety, equal opportunities and the right to be paid a minimum wage.

In this unit the learner will develop an understanding of what is meant by the terms 'rights' and 'responsibilities' and how they are enforced in the workplace. They will also gain an understanding of some of the responsibilities of both employers and employees. Learners will learn how to find sources of help and advice relating to their rights and responsibilities in the workplace.

## **Essential resources**

Learners need access to appropriate sources of information about rights and responsibilities in the workplace.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Understand why rights and responsibilities are important in a workplace	1.1	Explain reasons why rights and responsibilities are important in a workplace	<ul style="list-style-type: none"> <li>□ <i>Reasons why rights and responsibilities are important:</i> safety and wellbeing of staff, visitors and customers in the workplace, complying with the law, complying with standards and morals of our society, provides guidelines for resolving workplace problems or conflict in an appropriate way, establishes order and agreed obligations in a workplace, enables employers to conduct business in a fair and productive way, protection of employees and employers</li> </ul>
		1.2	Explain how rights and responsibilities are enforced in a workplace	<ul style="list-style-type: none"> <li>□ <i>Types of rights:</i> rights e.g. human rights, workplace rights, rights of the child, legal rights, informal rights, e.g. club membership</li> <li>□ <i>Types of responsibilities</i> e.g. member of society, workplace responsibilities, family responsibilities</li> <li>□ <i>How rights and responsibilities are enforced:</i> use of legislation, codes of conduct; regulatory or advisory bodies/organisations; employer and peer expectations</li> </ul>
2	Understand rights and responsibilities of employees and employers	2.1	Outline the responsibilities employers have to employees	<ul style="list-style-type: none"> <li>□ <i>Responsibilities of employers:</i> health and safety; pay and benefits; job recruitment and advertising; terms and conditions at work; contract of employment; appraisal, promotion and training; dismissal, redundancy and retirement, privacy of personal information</li> </ul>
		2.2	Outline the rights and responsibilities an employee has at work	<ul style="list-style-type: none"> <li>□ <i>Rights and responsibilities of employees:</i> rights, e.g. to fair pay, to be kept safe, given equality of opportunity; responsibilities, e.g. follow procedures for safety, punctuality, fulfil contracted duties</li> </ul>
		2.3	Explain the implications of employee rights and responsibilities in a workplace	<ul style="list-style-type: none"> <li>□ <i>Implications:</i> safe work environment; policies and procedures; work culture</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		2.4	Describe data protection and confidentiality procedures for the use, storage and exchange of information in a workplace	<ul style="list-style-type: none"> <li>□ <i>Data protection:</i> in relation to most recent data protection legislation and guidance</li> </ul>
3	Know how to obtain guidance and information about rights and responsibilities at work	3.1	Identify key representative bodies for employers and employees who would be able to advise on rights and responsibilities	<ul style="list-style-type: none"> <li>□ <i>Representative bodies:</i> e.g. Health and Safety Executive (HSE), Citizens Advice Bureau (CAB), Equality and Human Rights Commission, trade unions, staff associations, Criminal Records Bureau (CRB)</li> </ul>
		3.2	Describe the type of advice given by key representative bodies	<ul style="list-style-type: none"> <li>□ <i>Type of advice:</i> safety of working environment and practices; financial; legal; benefits, equality and diversity</li> </ul>

## Information for tutors

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### Delivery

Although this unit could be delivered through small group discussions, it is important to use a range of delivery methods. Television programmes or extracts from films can be a valuable learning tool. Similarly, speakers invited to share their experiences can also be a useful source of information.

Learners could consider the concept of rights and responsibilities in general before they focus on those that relate to the workplace. Discussion might include human rights, children's rights, consumer or patient rights, rights and responsibilities set out in legislation and those that are less formal such as those relating to particular groups or settings, for example within a school, society or club. Learners could consider issues such as justice, fairness, equality, citizenship and safety. They could then go on to relate these to the context of the workplace.

Tutors will need to be creative in their approach to this unit which is largely based on knowledge and understanding rather than skills. Active learning, however, can still be achieved, for example through learners going into the workplace to interview employers and employees or through role-play scenarios. Debate and discussion should also be encouraged, particularly when defining the terms and considering rights and responsibilities beyond those enshrined in law.

For each assessment criterion, it is likely that group discussion and shared research will be appropriate. However, learners should independently record their assessment evidence.

### Assessment

For 1.1, the learner needs to explain at least one reason why rights are important in the workplace, and at least one reason why responsibilities are important in the workplace. In addition, the learner's explanations must show a clear understanding of the terms 'rights' and 'responsibilities'.

For 1.2, the learner will need to consider how rights and responsibilities are enforced at work. The learner could be given a case study which requires them to explain how certain aspects of legislation could be enforced. Alternatively, the learner could select two different rights and explain how they are enforced in the workplace.

For 2.1, the learner needs to give an outline of at least four employer responsibilities.

For 2.2, the learner needs to outline two employee rights and two employee responsibilities. Examples can be provided to support the responses to 2.1 and 2.2.

For 2.3, the learner must explain the implications of the employee rights and responsibilities. For example, a learner listing an employee's right to one week's notice for every full year worked, could note that this means an employer cannot dismiss a member of the workforce on the spot simply because they are no longer needed.

For 2.4, learners must describe data protection and confidentiality procedures as relevant to a workplace. These will vary according to the type of workplace.

Learners should identify at least three key points regarding data protection and confidentiality in the workplace.

For 3.1, the learner must identify three key representative bodies. For 3.2, they must then describe the type of advice given by each of the chosen representative bodies. Trade unions, staff associations and bodies such as the CBI or trade associations can be used as sources of information and guidance. A case study can be used.

### Suggested resources

#### Other

Gunn I, Glencross K, Love D, Mason J, Milford S and Walker N – *WorkSkills Level 2 Complete Learning and Teaching Pack* (Pearson, 2011) ISBN 9781846909740

#### Websites

<a href="http://www.acas.org.uk/">www.acas.org.uk/</a>	Arbitration service, advice on health and wellbeing at work
<a href="http://www.adviceguide.org.uk">www.adviceguide.org.uk</a>	Citizens Advice Bureau
<a href="http://www.direct.gov.uk/en/RightsAndResponsibilities/Yourright">www.direct.gov.uk/en/RightsAndResponsibilities/Yourright</a>	General rights and responsibilities in the workplace including rights for people with disabilities, carers, older people and young people
<a href="http://www.tuc.org.uk/">www.tuc.org.uk/</a>	Trades Union Congress (TUC) downloadable leaflets about rights at work including details about minimum wage and equality in wages
<a href="http://www.worksmart.org.uk/rights/">www.worksmart.org.uk/rights/</a>	A TUC run website with information about rights at work (paternity and maternity leave, paid holiday etc)
<a href="http://www.equalityhumanrights.com">www.equalityhumanrights.com</a>	
<a href="http://www.eco.org.uk">www.eco.org.uk</a>	

# **Unit 31: Managing your Health at Work**

**Unit reference number: H/503/2880**

**Level: 2**

**Credit value: 1**

**Guided learning hours: 10**

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## **Unit aim**

The aim of this unit is for learners to develop understanding of how to manage personal health in the workplace and the support provided by employers in maintaining health.

## **Unit introduction**

In this unit learners will develop understanding of how they can be instrumental in managing their own health whilst at work. The learner will find out what their responsibility is in maintaining good health at work and they will consider the importance of taking regular breaks throughout the day, maintaining a balanced diet and wearing suitable clothing for the job. Learners will also learn what services an employer might offer employees and other sources of help to ensure good health at work.

## **Essential resources**

Learners need access to appropriate sources of information about maintaining good health at work.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the employee's role in maintaining good health at work	1.1	Explain why it is important for employees to maintain good health at work	<ul style="list-style-type: none"> <li>□ <i>Why it is important for employees to maintain good health at work:</i> improves performance; reduces stress; reduces sick leave; reduces risk of injury; increases enjoyment of work; increased enjoyment of leisure time</li> </ul>
		1.2	Explain how employees can maintain good health in the workplace	<ul style="list-style-type: none"> <li>□ <i>How employees can maintain good health in the workplace:</i> appropriate diet and exercise; reduce and report potential risks and hazards; wear correct protective clothing if required; take regular breaks, maintain work-life balance; manage ill health appropriately</li> </ul>
2	Know the services employers can provide to maintain the health of the workforce	2.1	Describe services that can be provided by employers to help maintain the health of the workforce	<ul style="list-style-type: none"> <li>□ <i>Services provided by employers:</i> first aid; health surveillance and medical check-ups; access to health support networks, e.g. advice on dealing with addictions, counselling services; sick pay; health initiatives to benefit employees, e.g. healthy eating campaigns in the workplace canteen, keeping active campaigns, subsidised gym memberships or bicycle purchases for staff, onsite gym or recreational facilities, free annual flu vaccinations at work</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know sources of help to ensure good health at work	3.1	Describe different sources of help to ensure good health at work	<ul style="list-style-type: none"> <li>□ <i>Sources of help</i>: workplace occupational health; trade unions; community occupational health; first aid officer; health and safety officer; support networks (particularly for self-employed workers)</li> </ul>
		3.2	Describe the services offered by different sources of help	<ul style="list-style-type: none"> <li>□ <i>Services offered by sources of help</i>: prevention of risks or hazards to health in the workplace; counselling for stress, addictions or any other personal difficulties; advice on rights and responsibilities in the workplace; risk assessments; provision of specialist support equipment, first aid treatment to deal with injuries or medical incidents in the workplace</li> </ul>

## Information for tutors

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### Delivery

Tutors delivering this unit have the opportunity to use a wide range of techniques including presentations, seminars, practical workshops, external trips and guest speakers. Additional learning resources can include journals, videos, DVDs, case studies, learner presentations and group work.

For learning outcome 1, the reasons why it is important for employees to maintain their health at work could be explored through case studies. Learners will need to explore the role they need to play in maintaining their own health at work. Learners could be given practical scenarios which allow the learner to identify what action they could take to ensure good health for example 'How can employees maintain good health when a sickness bug goes through the workplace?' Learners could also be given newspaper or magazine articles to find out what type of health situations arise and how good health can be promoted.

In learning outcome 2, learners will find out about the services an employer might provide to promote good health. If possible, a local employer could be invited to talk about the services they offer. Alternatively, learners could search the websites of large companies to find out what services they offer.

Learners should have the opportunity to find information on different sources of help available to them at work. They should understand the role of the service and what the service provides. It would also be appropriate for learners to consider services available to self-employed workers.

### Assessment

For 1.1, the learner needs to give two reasons why it is important for employees to maintain good health at work.

For 1.2, the learner must explain how employees can maintain good health in the workplace. The learner will need to provide detailed information on five different examples, such as the employee being responsible for maintaining a healthy diet and taking regular exercise. Practical examples of how this can be achieved must also be provided, for example using the stairs instead of the lifts, and drinking sufficient water throughout the day. This could be evidenced in a number of different ways, for example the learner can gather the information and present it to the group or they can prepare an article for an internal newsletter for colleagues. If this method is chosen, the learner should use language, formatting and structure appropriate for the intended audience.

For 2.1, the learner must describe two different services that an employer provides to promote healthy working. This evidence can be a letter to employees naming the service on offer and explaining what the service is. Alternative methods of evidencing learning can be used, such as designing a web page on employee benefits, or a leaflet campaign to be used in an organisation.

For 3.1 and 3.2, the learner must describe different sources of help to ensure healthy working and explain the services provided. Three different sources should be described and a description of the services offered should be given for each source.



## Suggested resources

### Websites

[www.direct.gov.uk/en/Employment/Employees/HealthAndSafetyAtWork/index.htm](http://www.direct.gov.uk/en/Employment/Employees/HealthAndSafetyAtWork/index.htm)

Advice on health and safety at work

[www.worksmart.org.uk](http://www.worksmart.org.uk)

A TUC run website with information about rights at work

[www.workingforhealth.gov.uk](http://www.workingforhealth.gov.uk)

# Unit 32: Preparing for Work Placement

**Unit reference number:** F/503/2885

**Level:** 2

**Credit value:** 1

**Guided learning hours:** 10

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## Unit aim

This unit enables learners to prepare for the work placement, by identifying a work placement, finding out about the organisation including the aims of the organisation and the terms and conditions of the work placement. Learners will consider their skills and set goals to maximise their skills during the work placement.

## Unit introduction

Attending a work placement gives the learner the opportunity to experience a work setting. They will find out about the roles and responsibilities of individual employees, specific types of careers and general workplace skills. However, if the learners are not prepared for the work placement, and does not know what they expect to learn, then this valuable experience can not reach its full potential.

In this unit learners find out, before starting their work placement, about the company or organisation where they are going to be working. It will also raise their awareness of the skills and knowledge they already have and could use during the work placement. Learners will look at how to set goals which meet their employer's expectations. All these skills will be crucial when learners begin the job seeking process.

Although the term 'company or organisation' has been used throughout this unit, it can refer to any type of work placement for which the learner can be preparing.

## Essential resources

To make this unit relevant, the learner must be in the process of preparing to go on a suitable work placement. Employers must also be prepared for the upcoming work placement and support the learner to gather relevant information.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know the company or organisation where the work placement is planned	1.1	Describe the company or organisation providing the work placement	<ul style="list-style-type: none"> <li>□ <i>Information about the company/organisation:</i> type of company or organisation; ownership, e.g. public or private; function, e.g. service provision, retail, construction, logistics, administrative; location; size e.g. small, large, number of employees, number of departments, international, national or local organisation; internal and external customers; key purpose, e.g. to make money, to expand, to widen the customer base, to build houses</li> <li>□ <i>Sources of information:</i> e.g. company leaflets or brochures, company or organisation website, newspaper, magazine or internet articles about company or organisation, Jobcentre Plus, learners who have previously been on work placement at the same company or organisation, staff from the company or organisation, conversation or correspondence with company or organisation providing the work placement</li> </ul>
		1.2	Describe the key purpose of company or organisation	
2	Know the information needed before starting the work placement	2.1	Describe the terms and conditions of the work placement	<ul style="list-style-type: none"> <li>□ <i>Terms and conditions of work:</i> hours of work; absence procedures; dress code; line manager or supervisor; health and safety responsibilities, e.g. evacuation procedures, first aid procedures, reporting hazards; refreshment facilities; seeking advice relating to work and/or colleague relationships</li> <li>□ <i>Tasks:</i> daily routine tasks, e.g. opening post, taking messages, checking emails, checking equipment for health and safety purposes, setting up equipment, liaising with line manager; project work</li> </ul>
		2.2	Describe the tasks to be performed as part of the work placement	

Learning outcomes		Assessment criteria		Unit amplification
3	Know what the company or organisation expects of the learner during the work placement	3.1	Describe why workplace values are important for success at the work placement	<ul style="list-style-type: none"> <li>□ <i>Workplace values</i>: definition of values, e.g. concepts and ideas that lead to workplace satisfaction; different types of values e.g. place customer service at heart of business, produce quality products, celebrate diversity, promote mutual respect, encourage creativity, recognise and reward achievement and good work</li> <li>□ <i>Importance of workplace values in a work placement</i>: helps learner understand what is expected of them by employer and helps in meeting those expectations, e.g. how to treat other staff and customers appropriately, how to do job to a high standard, how to prioritise daily tasks, how to make decisions</li> </ul>
		3.2	Describe personal presentation requirements appropriate to the work placement	<ul style="list-style-type: none"> <li>□ <i>Personal presentation</i>: appropriate clothing for job role; personal hygiene; attitudes and behaviours; body language</li> </ul>
		3.3	Describe how to deal effectively with situations of emotional stress, difficulty or confusion during the work placement	<ul style="list-style-type: none"> <li>□ <i>Dealing effectively with situations of emotional stress, difficulty or confusion</i>: use appropriate sources of support and guidance in situations of emotional stress, e.g. speak to work placement supervisor if there are difficulties in getting along with another colleague, ask questions or request clarification if instructions or messages are unclear or confusing, ask for help or guidance from other people if a task is difficult or unclear, consult user guides or request further training and assistance if nervous about using a new piece of equipment</li> </ul>
4	Be able to set goals relating to the work placement	4.1	Set goals for skills development relating to the work placement	<ul style="list-style-type: none"> <li>□ <i>Goal setting for the work placement</i>: different types of goals, e.g. personal goals, work-related goals, skills development; goals for the work placement should be in line with employer's expectations for the work placement; setting a goal that draws on current skill or knowledge, or on skills and knowledge the learner would like to acquire</li> </ul>
		4.2	Set goals for personal development relating to the work placement	

## Information for tutors

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### Delivery

Although each learner will be attending a different work setting, the principles behind preparing for the work placement will be the same. Before starting to find out about their work placement, learners could discuss what information they need to know about the organisation in which they are going to be working. Learners could compile a checklist to help direct their research. They could collect information on aspects such as the function of the organisation, the key purpose, its structure (if relevant) and types of customers. Information can also be gathered from the internet and visits to the careers office to find out about the organisation providing the work placement.

To help learners understand the concept of 'terms and conditions' of work, they could compare different terms and conditions of work to identify the common elements. Although some aspects will not be relevant for work placement (for example annual leave entitlement) learners should be able to identify those terms and conditions that are relevant, for example dress code, absence notification, hours of work.

Learners will need to extract the relevant details about the main tasks relating to what they will be doing at the company or organisation. This could be done from leaflets or marketing brochures for the organisation, visits to the careers office and/or tutor-led discussions. Ideally, the learner will have an interview with the employer before starting the work placement. This would give them an opportunity to find out about the tasks they will be expected to undertake. Alternatively, learners who have previously participated in the same or similar work placement could be asked to speak to learners in small groups.

It would be useful for tutors to stress the importance of workplace values and rules and the possible skills or qualities needed to satisfy the requirements of the work placement. To help learners understand the concept of 'workplace values', they could think about their own values, for example, honesty, being trustworthy, or respect for others. This could then be translated into the workplace situation and how it relates to day-to-day working and enhances the chances of a successful work placement experience.

Employers could be invited as guest speakers to discuss expectations of learners during work placement. It is important that learners are given the opportunity to discuss these qualities and expectations so that they can identify a range of possible skills and goals to aim for. These should be linked to their course requirements or career ideas, to help them get the most out of their time on work experience.

Learners going on a work placement might feel nervous and concerned that they will appear incompetent or will not be able to do what they are asked to do. It would, therefore, be beneficial to prepare learners to deal effectively with any potential feelings of stress or confusion. For example, a group discussion or role-play activity could be used to explore different types of stressful, confusing or difficult situations in a work placement; this could help learners in developing skills and confidence in asking appropriate questions or asking others for help and guidance. Alternatively, learners could watch a TV or film clip that depicts a stressful or confusing scene in the workplace and then hold a group discussion about what could be done to address the stress, difficulty or confusion in that scenario. This could help address learners' fears and concerns about handling any uncertain or difficult situations they can encounter.

Learners can discuss possible work placement goals in group situations and/or individually with tutor or careers advisers, but should be encouraged to come up with their own final action plan, identifying personal targets and opportunities to develop skills or knowledge on the work placement. Time will need to be spent helping learners produce goals which are relevant to their situation and realistic.

## Assessment

For 1.1 and 1.2, the learner must describe key information about their proposed work placement. The description needs to include information on the type, size and purpose of the organisation, the organisational structure and its internal and external customers (if relevant) as well as the main purpose or objective of the company or organisation.

For 2.1, the learner must describe the terms and conditions of work that are relevant to their work placement. Information could include details such as hours of work, dress code, number of days attending work placement, breaks, absence procedures.

For 2.2, the learner must describe the tasks that they are likely to do during work placement. This description should provide detailed information for each task and should not simply be a list. Details could include information on the procedures to be followed, health and safety issues, quality checking processes, for example check work has been completed to a satisfactory standard by the line manager, timescales (if relevant).

For 3.1, the learner must describe the importance of at least two workplace values and why they are important to a work placement experience. Part of this description should demonstrate the learner's understanding of what workplace values are.

Evidence for 3.2 could be included as part of 3.1. The learner must describe at least two personal presentation requirements for the upcoming work placement.

For 3.3, the learner needs to provide at least two examples of situations in the workplace where they might encounter stress, difficulty or confusion. For each example, they must explain at least one positive action they could take to help resolve the stress, difficulty or confusion. The learner's description of the positive action must be appropriate and relevant to the nature of the stressful, difficult or confusing situation they have given as an example.

For 4.1 and 4.2, the learner must demonstrate their ability to set specific, realistic goals for the work placement. The learner needs to provide at least two goals related to skills development and at least two goals related to personal development. The skills development goals may relate to existing skills which the learner would like to use during the work placement or to a new skill the learner would like to develop during the work placement. The personal development goals may relate to working well with colleagues, getting to work on time, answering the telephone in following company procedures etc.

## Suggested resources

### Websites

<a href="http://morethanwork.net">http://morethanwork.net</a>	The Higher Education Academy
<a href="http://www.need2know.co.uk">www.need2know.co.uk</a>	The Leading Need Know site on the Web
<a href="http://www.projectsmart.co.uk/smart-goals.html">www.projectsmart.co.uk/smart-goals.html</a>	Exploring trends and developments in project management today
<a href="http://www.qmr.com/products/adventure/docs/workbook/chapter4.asp">www.qmr.com/products/adventure/docs/workbook/chapter4.asp</a>	Workplace values
<a href="http://www.trident-edexcel.co.uk">www.trident-edexcel.co.uk</a>	Business and Education London south
<a href="http://www.work-experience.org">www.work-experience.org</a>	National Council for Work Experience

# Unit 33: Learning from Work Placement

**Unit reference number:** L/503/2887

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 20

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## Unit aim

The aim of this unit is to ensure that learners reflect on their work placement and use this experience to set career related goals.

## Unit introduction

Work placement can be a valuable experience for all learners, helping them to develop new skills and increase their knowledge of a vocational area. However, to achieve this, the learner must reflect on what they have learned and use that learning for future development and goal setting. The unit has been designed to be used after a learner has experienced a work placement. However, as learners need to have gathered evidence from the work placement to complete the unit, they will need to be familiar with the requirements of the unit before undertaking their work placement.

## Essential resources

Learners will need to have undertaken a period of work experience.



## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to reflect on what was learnt on the work placement	1.1	Maintain a log of work placement tasks and personal development	<ul style="list-style-type: none"> <li>□ <i>Skills:</i> personal skills, e.g. self-management, teamwork, business and customer awareness, communication; knowledge: of work sector, of the requirements of the workplace, of products and services; personal qualities, e.g. enthusiasm, patience, confidence, curiosity</li> <li>□ <i>Log of tasks undertaken:</i> employer reference, tutor report, description of tasks undertaken, video log, reports, minutes of meetings attended</li> </ul>
		1.2	Describe skills and knowledge gained during the work placement	<ul style="list-style-type: none"> <li>□ <i>Describe knowledge gained during work placement:</i> what was learned from specific work placement tasks, when this was learned, how it was learned, how it can be evidenced</li> </ul>
2	Know how to improve the work placement experience	2.1	Identify aspects of the work placement experience that could have been improved	<ul style="list-style-type: none"> <li>□ <i>Aspects that could have been improved:</i> e.g. additional learning or experience of a particular task, practise certain skills before undertaking work placement, communicating more effectively with supervisor, managing time more efficiently</li> </ul>
		2.2	Describe how improvements could be made to tasks carried out during work placement	

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to use learning from the work placement to set career-related goals	3.1	Describe how the work placement experience might assist them in making choices about a future career	<ul style="list-style-type: none"> <li>□ <i>Making choices about a future career as a result of work placement:</i> e.g. knowledge of new vocational area or area of interest, confirming whether they do or do not wish to work in a particular sector or industry, awareness of personal skills, awareness of strengths and weaknesses, desire to find out further information about a particular career, industry or organisation</li> </ul>
		3.2	Set short-term and long-term goals which build on own learning from the work placement	<ul style="list-style-type: none"> <li>□ <i>Setting goals:</i> SMART goals; skills and knowledge development, e.g. further study, investigate specific career options or work areas; employment opportunities or goals, e.g. apply for full-time employment, seek voluntary work in a particular area</li> </ul>

## Information for tutors

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### Delivery

To achieve this unit, learners must have experienced a work placement.

The length of time spent in the work placement is not defined, but sufficient time must be given to enable learners to achieve the assessment criteria.

Learners will be expected to have gathered evidence of the tasks or activities that they are involved in during their work placement. They will then be able to use the evidence gathered from the work placement to demonstrate competence for each assessment criterion. Learners are expected to have gathered evidence of new skills or knowledge they have acquired as a result of various work placement tasks or activities. It would therefore be helpful for tutors to encourage learners to think about how they can show that they have gained new skills or knowledge from the tasks and activities.

Before starting the work placement, a group discussion can be used to identify different forms of evidence. This could include employer or tutor reports, evidence of work completed, descriptions of tasks or activities undertaken (perhaps in the form of a diary or minutes of meetings that the learner attended or facilitated). In this regard, the learner would need to adhere to the company policy on confidentiality and intellectual property.

Different methods of record keeping could be discussed with learners. Examples of previous learner work could be shown. Paper-based and/or electronic record keeping methods can be used.

Learning outcome 1 focuses on skills and knowledge gained during the work placement experience. The skills discussed should be based on the CBI employability competencies detailed in their *Time Well Spent* report found on the CBI website: [www.cbi.org.uk](http://www.cbi.org.uk).

The skills required for employability include self-management, team working, business and customer awareness, problem solving, communication, number and ICT skills. It would be appropriate to spend time discussing the meaning of these skills and how they relate to individual learners. Learners could develop checklists which allow the learner to describe when they demonstrated their skills during their work placement. These could also be used to describe those aspects of the work placement experience that could have been improved, and how they could have been improved. Learners also need to consider their strengths based on their personal skills, knowledge and experience. One-to-one or small group discussions can be used to identify what the learner's strengths are. Alternatively, learners can ask their employer to help them identify their strengths. Small group discussions could be used to help the learner identify the challenges of the work placement. Record sheets can be developed to allow the learner to identify the challenges and then state how they overcame them.

For learning outcome 3, the learner will need to know and understand what SMART goals are. This method of target setting is often used as part of performance development review processes and it is important for learners to understand how to set such goals. The acronym has a number of variations:

**S** – specific, significant, stretching

**M** – measurable, meaningful, motivational

**A** – agreed upon, attainable, achievable, acceptable, action-oriented

**R** – realistic, relevant, reasonable, rewarding, results-oriented

**T** – time-based, timely, tangible, trackable.

A useful website for more detailed information on SMART targets is [www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html)

## Assessment

For 1.1, learners must create and maintain a detailed log of the work placement tasks. The log should include the skills and knowledge related to the work activities as well as personal development such as confidence. Tutors could provide a proforma for the learner to complete.

For 1.2, the learner must describe the skills and knowledge they gained during the work placement. The learner could identify specific challenges that they faced, and how these helped to develop specific skills and knowledge.

For 2.1, the learner needs to identify any aspects of the work placement experience that could have been improved. This could be cross-referenced to the evidence provided in 1.1 and 1.2. Alternatively, a separate piece of work, which is more generic, could be provided.

For 2.2, the learner must describe at least two ways that improvements could be made to the tasks carried out during work placement. Learners could consider improvements such as more effective communication, time keeping, and positive attitude.

In 3.1, the learner needs to make straightforward value judgements on how their work placement has helped them in planning their career choices. The learner must describe at least one way in which the work placement experience has influenced their thinking about their future. This does not need to be lengthy or complex.

In achieving 3.2, the learner must set and produce appropriate evidence of two short-term and two long-term SMART goals as a result of what they have learned from their work placement. Evidence for the learner's goals could be a log, presentation, poster, written statement provided by the learner (with supporting notes from the tutor) or another appropriate format.

The learner can use their short term goals to build towards their long term goals.

## Suggested resources

### Websites

<a href="http://www.direct.gov.uk/en/EducationAndLearning">www.direct.gov.uk/en/EducationAndLearning</a>	Advice on education and learning including options for 14-19 age group and adult learning
<a href="http://www.cbi.org.uk">www.cbi.org.uk</a>	UK's premier business lobbying organisation, providing a voice for employers at a national and international level
<a href="http://www.work-experience.org">www.work-experience.org</a>	National Council for Work Experience

## Unit 34:

## Working in a Team

**Unit reference number:** R/503/2843

**Level:** 1

**Credit value:** 3

**Guided learning hours:** 30

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### Unit aim

This unit looks at how learners can be effective members of a team. Learners will identify the skills, roles and responsibilities needed to complete the team task and match their skills accordingly. Learners will take part in team tasks and review their contribution.

### Unit introduction

Since very few people work in complete isolation in the workplace, most employers seek employees who are able to work effectively with others in a team or group setting. An effective team depends on the cooperation and skills of all team members.

This unit helps learners to understand how they can contribute to the success of a team, based on an understanding of their own strengths, skills and experiences, as well as the nature of the task at hand.

Additionally, learners will develop an understanding of the key behaviours and attitudes required to communicate and cooperate with others in a team. They will also learn about the roles and responsibilities of all team members by completing a team task. Learners will consider their effectiveness as team members and identify areas for improvement.

## Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes		Assessment criteria		Unit amplification
1	Know that effective teamwork requires team members to behave in certain ways	1.1	Outline positive behaviours necessary for teamwork	<ul style="list-style-type: none"> <li>□ <i>Behaviours for effective teamwork:</i> encouraging, considerate, ability to listen, respectful, tolerant, patient, flexible, loyal, ability to accept constructive criticism, able to motivate others</li> </ul>
2	Know how to contribute to a team task	2.1	Outline own strengths, skills and experiences that might be relevant to team task	<ul style="list-style-type: none"> <li>□ <i>Strengths, skills and experiences:</i> organising skills; practical skills, e.g. computer literate, photography skills; previous experiences, e.g. experience of planning an event; communication skills, e.g. multi-lingual, skilled writer; interpersonal skills, e.g. good listener, confident, punctual, reliable, patient</li> </ul>
		2.2	Identify team skills needed to complete team task	
		2.3	Outline how own strengths and skills could match the needs of the team task	<ul style="list-style-type: none"> <li>□ <i>Aspects of a task they could do well, based on identified strengths, skills and experience:</i> e.g. good spelling and language skills suited to task of proofreading written work produced by team, organising skills suited to drawing up timeline for completion of the team project</li> </ul>
3	Know the roles and responsibilities of team members (including their own) in relation to a given task	3.1	Identify what the task is about and what the team is working to achieve	<ul style="list-style-type: none"> <li>□ <i>What team is working to achieve:</i> aim or aims of the team's task, assignment or project; goals, deadlines, timelines; particular quality or standard of work required</li> </ul>
		3.2	Identify own role and responsibilities and those of others in the team	<ul style="list-style-type: none"> <li>□ <i>Responsibilities within the team:</i> own individual roles and responsibilities agreed with whole team; individual roles and responsibilities of other team members</li> </ul>
		3.3	Outline how own role contributes to the work of the team as a whole	<ul style="list-style-type: none"> <li>□ <i>Contribution of own role to work of whole team:</i> how own role affects roles of others in the team; how own role affects overall team success</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Be able to work positively as a member of a team	4.1	Give examples of listening to the ideas and suggestions of others	<ul style="list-style-type: none"> <li>□ <i>Listen to the ideas and suggestions of others:</i> paying attention to and showing respect for the advice, ideas, suggestions or opinions put forward by others, e.g. by not interrupting, asking questions to clarify what was said</li> </ul>
		4.2	Give ideas and suggestions as to how the team might complete their task	<ul style="list-style-type: none"> <li>□ <i>Give ideas and suggestions as to how the team might complete their task:</i> e.g. participating in group discussions, problem-solving or 'thoughtshower' sessions, finding out information and reporting back to the group</li> </ul>
		4.3	Give examples of offering help or support to other team members	<ul style="list-style-type: none"> <li>□ <i>Offer help to other team members:</i> e.g. offer to help other team members complete their task, volunteer to take on the task of a team member who is absent</li> </ul>
		4.4	Give examples of accepting the help or advice of others	<ul style="list-style-type: none"> <li>□ <i>Accept help or advice from other team members:</i> try out ideas or suggestions put forward by others; listen respectfully to advice from another team member; accept help from other team members in order to get individual task finished on time</li> </ul>
		4.5	Complete the aspects of the allocated task, in line with the brief	<ul style="list-style-type: none"> <li>□ <i>Complete own task in line with the given brief:</i> complete task to required standard and within stipulated timeframe</li> </ul>
5	Be able to review own performance as a member of a team	5.1	Identify which positive teamworking behaviours were demonstrated by self in undertaking the task	<ul style="list-style-type: none"> <li>□ <i>Positive teamworking behaviours demonstrated:</i> listened to opinions of others, responded politely to questions, satisfactorily completed the individual task assigned to them, helped others carry out their tasks or responsibilities, offered suggestions as to how the team's goals could be achieved, accepted advice from others, learner's own contribution contributed to success of whole task</li> </ul>
		5.2	Identify own teamworking skills that could be improved	<ul style="list-style-type: none"> <li>□ <i>Identify teamworking skills that could be improved:</i> be more patient with other team members, don't interrupt when others are making suggestions, pay more attention to timings allocated for completion of own individual task</li> </ul>

## Information for tutors

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### Delivery

The emphasis in this unit is on developing the learner's knowledge and understanding of teamwork through a practical teamworking task.

In order to understand the positive behaviours necessary for effective teamwork in learning outcome 1, it would be useful for learners to compare two different teamworking scenarios. This could be done in small groups. A question and answer session could determine the positive behaviours. Key words could be collated on a board or flipchart. Teams could work to design a poster or presentation which identifies positive behaviour. The posters or presentations could be displayed in the class or working area for learners to refer to during the rest of the unit. Alternatively, line managers could discuss with individual learners their impressions of different teamworking scenarios within the workplace. Learners could obtain input from colleagues regarding their ideas on positive behaviours required for teamwork.

Learning outcomes 2, 3, 4 and 5 require the identification of team and individual tasks which would enable the participation of all group members. Learners could be involved in selecting the group task. Teams could be made up of around 4-7 people. In teams, learners could discuss possibilities for tasks and then report back to the rest of the group. Learners could develop a whole group discussion to decide which tasks are manageable, achievable and match the skills and interests of the team members in 'What if?' scenarios.

For learning outcome 2, learners could make a list of their own strengths, skills and experiences and match them to individual tasks in the chosen group task.

For learning outcome 3, learners could work with team members for the group task to develop a mind map or flow chart-type diagram, using prompts and question and answer sessions until a picture of the whole task and the individual roles and responsibilities of each member is complete. Learners could present their ideas about how their own role contributes to the work of the team to the rest of the group.

Learners need to implement the agreed team task for learning outcome 4. They could work in groups to devise a checklist to log their involvement in the task.

Learners should be encouraged to analyse their own performance in the team task for learning outcome 5, using evidence from their checklist. Individual learners should concentrate on their behaviour and skills as a member of the team rather than how well the outcome was achieved. How learners can develop teamworking skills could be explored through tutorials, small group discussions or discussions with a line manager or supervisor.

### Assessment

For 1.1, the learner must outline at least two different positive behaviours that are needed for teamwork to be effective. This information could be evidenced in a number of different ways, for example a leaflet, presentation or poster.

For 2.1, 2.2, and 2.3 the learners need to refer to the identified group task when identifying their strengths, skills and experiences and how these may help them complete aspects of the task. A chart could be suitable evidence for these criteria. The learner needs to be able to make the link between their strengths, skills and experiences and the group task. Alternative methods of evidencing learning may be used.



The evidence required for 3.1, 3.2 and 3.3 could be combined into one task. The information could be evidenced in a number of ways, such as PowerPoint slides, a poster or through one-to-one discussion with the tutor or line manager. The learner needs to refer to the chosen task and identify what the task is about and its intended outcome, and the role and responsibilities of all members of the team for 3.1 and 3.2.

For 3.3, the learner needs to outline at least two reasons why their own role is necessary for the successful completion of the group task.

The evidence required for 4.1, 4.2, 4.3, 4.4 and 4.5 may be provided in a logbook completed by the learner during the task. The logbook may take a variety of formats, depending on the needs of individual learners. The logbook needs to be verified by the tutor/line manager. Alternative methods of evidencing may be used, for example a witness statement or observation.

For 5.1, the learner needs to identify details about which positive teamworking behaviours (identified in 1.1) they demonstrated during the completion of the task. Giving two ways of improving their teamworking skills would provide the evidence for 5.2. Both these criteria could be assessed through a one-to-one discussion with the tutor/line manager. Responses should be recorded for verification purposes.

### Suggested resources

#### Websites

<a href="http://www.lifecoachexpert.co.uk">www.lifecoachexpert.co.uk</a>	Advice on improving your life
<a href="http://www.projectsmart.co.uk/team-building.html">www.projectsmart.co.uk/team-building.html</a>	Advice on team building
<a href="http://www.worksmart.org.uk/career">www.worksmart.org.uk/career</a>	TUC run website giving career advice

## 13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel: **[www.edexcel.com/contactus](http://www.edexcel.com/contactus)**
- BTEC: **[www.btec.co.uk/contactus](http://www.btec.co.uk/contactus)**
- Work-based learning: **[www.pearsonwbl.com/contactus](http://www.pearsonwbl.com/contactus)**
- Books, software and online resources for UK schools and colleges: **[www.pearsonschool.com/contactus](http://www.pearsonschool.com/contactus)**

Other sources of information and publications available include:

- *Edexcel Equality Policy*
- *Edexcel Information Manual* (updated annually)
- *Reasonable Adjustment and Special Considerations for BTEC and Edexcel NVQ Qualifications*
- *Recognition of Prior Learning Policy*
- *Quality Assurance Handbook* (updated annually)

Publications on the quality assurance of BTEC qualifications are on our website at [www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx](http://www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx)

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to [www.edexcel.com/resources/Pages/home.aspx](http://www.edexcel.com/resources/Pages/home.aspx)

### Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website at:

[www.edexcel.com/resources](http://www.edexcel.com/resources)

## 14 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory, or through customised training at your centre.

The support we offer focuses on a range of issues, including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building Functional Skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website at: [www.edexcel.com/training](http://www.edexcel.com/training). You can request customised training through the website or you can contact one of our advisors in the Training from Edexcel team via Customer Services to discuss your training needs.

### BTEC training and support for the lifetime of the qualifications

**Training and networks:** our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We have designed our new network events programme to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region. Sign up to the training you need at: [www.btec.co.uk/training](http://www.btec.co.uk/training)

**Regional support:** our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments. If you would like your Curriculum Development Manager to contact you, please get in touch with your regional office on: **0844 463 2535**.

### Your BTEC support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our BTEC support team to help you whenever – and however – you need, with:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert – at: [www.edexcel.com/subjectadvisors](http://www.edexcel.com/subjectadvisors)
- **Ask Edexcel:** submit your question online to our Ask Edexcel online service [www.edexcel.com/ask](http://www.edexcel.com/ask) and we will make sure your query is handled by a subject specialist.

# Annexe A

## National Occupational Standards/mapping with NVQs

The grid below maps the knowledge covered in the Pearson BTEC Level 1 Award, Certificate and Diploma in Business Administration against the underpinning knowledge of the Level 1 NVQ in Business Administration, SSC National Occupational Standards.

### KEY

# indicates partial coverage of the NVQ unit

a blank space indicates no coverage of the underpinning knowledge

NVQs	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8	Unit 9	Unit 12	Unit 13	Unit 14	Unit 15	Unit 16	Unit 17	Unit 18	Unit 19	Unit 32
Q101 Manage own performance in a business environment						#									
Q102 Improve own performance in a business environment						#									
Q103 Work in a business environment		#							#						
Q104 Solve business problems	#						#								#
Q105 Work with other people in a business environment		#	#						#						
Q106 Communicate in a business environment		#							#	#	#	#		#	
Q107 Make and receive telephone calls												#			
Q108 Assist in handling mail													#		
Q110 Prepare text from notes using touchtyping														#	
Q111 Use a filing system															
Q112 Archive information															

<b>NVQs</b>	<b>Unit 4</b>	<b>Unit 5</b>	<b>Unit 6</b>	<b>Unit 7</b>	<b>Unit 8</b>	<b>Unit 9</b>	<b>Unit 12</b>	<b>Unit 13</b>	<b>Unit 14</b>	<b>Unit 15</b>	<b>Unit 16</b>	<b>Unit 17</b>	<b>Unit 18</b>	<b>Unit 19</b>	<b>Unit 32</b>
Q113 Use occupational and safety guidance when using keyboards															
Q221 Use office equipment				#											
EML1 Using email					#					#					
WP1 Word processing software					#					#				#	

# Annexe B

## Mapping to Functional Skills

Entry 3	Unit number									
English – Speaking and listening	1	2	3	4	5	6	7	8	9	10
Respond appropriately to others and make some extended contributions in familiar formal and informal discussions and exchanges	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
English – Reading										
Read and understand the purpose and content of straightforward texts that explain, inform and recount information	✓							✓		✓
English – Writing										
Write texts with some adaptation to the intended audience								✓		

Entry 3	Unit number									
English – Speaking and listening	11	12	13	14	15	16	17	18	19	20
Respond appropriately to others and make some extended contributions in familiar formal and informal discussions and exchanges	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
English – Reading										
Read and understand the purpose and content of straightforward texts that explain, inform and recount information					✓				✓	✓
English – Writing										
Write texts with some adaptation to the intended audience					✓				✓	✓

<b>Entry 3</b>	<b>Unit number</b>							
<b>English – Speaking and listening</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
Respond appropriately to others and make some extended contributions in familiar formal and informal discussions and exchanges	✓	✓	✓	✓	✓	✓	✓	✓
<b>English – Reading</b>								
Read and understand the purpose and content of straightforward texts that explain, inform and recount information	✓	✓	✓					
<b>English – Writing</b>								
Write texts with some adaptation to the intended audience	✓	✓	✓					

<b>Entry 3</b>	<b>Unit number</b>									
<b>Mathematics</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<b>Representing</b> <ul style="list-style-type: none"> <li>understand practical problems in familiar contexts and situations</li> <li>begin to develop own strategies for solving simple problems</li> <li>select mathematics to obtain answers to simple given practical problems that are clear and routine</li> </ul>										
<b>Analysing</b> <ul style="list-style-type: none"> <li>apply mathematics to obtain answers to simple given practical problems that are clear and routine</li> <li>use simple checking procedures</li> </ul>										
<b>Interpreting</b> <ul style="list-style-type: none"> <li>interpret and communicate solutions to practical problems in familiar contexts and situations</li> </ul>										

Entry 3	Unit number									
Mathematics	11	12	13	14	15	16	17	18	19	20
<b>Representing</b> <ul style="list-style-type: none"> <li>understand practical problems in familiar contexts and situations</li> <li>begin to develop own strategies for solving simple problems</li> <li>select mathematics to obtain answers to simple given practical problems that are clear and routine</li> </ul>										
<b>Analysing</b> <ul style="list-style-type: none"> <li>apply mathematics to obtain answers to simple given practical problems that are clear and routine</li> <li>use simple checking procedures</li> </ul>										
<b>Interpreting</b> <ul style="list-style-type: none"> <li>interpret and communicate solutions to practical problems in familiar contexts and situations</li> </ul>										✓

Entry 3	Unit number							
Mathematics	21	22	23	24	25	26	27	28
<b>Representing</b> <ul style="list-style-type: none"> <li>understand practical problems in familiar contexts and situations</li> <li>begin to develop own strategies for solving simple problems</li> <li>select mathematics to obtain answers to simple given practical problems that are clear and routine</li> </ul>								



<b>Entry 3</b>	<b>Unit number</b>							
<b>Mathematics</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
<b>Analysing</b> <ul style="list-style-type: none"> <li>• apply mathematics to obtain answers to simple given practical problems that are clear and routine</li> <li>• use simple checking procedures</li> </ul>								
<b>Interpreting</b> <ul style="list-style-type: none"> <li>• interpret and communicate solutions to practical problems in familiar contexts and situations</li> </ul>								

<b>Entry 3</b>	<b>Unit number</b>									
<b>ICT – Use ICT systems</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
Interact with and use ICT systems to meet needs								✓		
Store information								✓		
Follow safety and security practices								✓		
<b>ICT – Find and select information</b>										
Use simple searches to find information								✓		
Select relevant information that matches requirements of given task								✓		
<b>ICT – Develop, present and communicate information</b>										
Enter and develop different types of information to meet given needs								✓		
Bring together different types of information								✓		
Use ICT-based communication								✓		

<b>Entry 3</b>	<b>Unit number</b>									
<b>ICT – Use ICT systems</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
Interact with and use ICT systems to meet needs					✓					
Store information					✓					
Follow safety and security practices					✓					
<b>ICT – Find and select information</b>										
Use simple searches to find information					✓					
Select relevant information that matches requirements of given task					✓					
<b>ICT – Develop, present and communicate information</b>										
Enter and develop different types of information to meet given needs					✓					
Bring together different types of information					✓					
Use ICT-based communication					✓					

<b>Entry 3</b>	<b>Unit number</b>							
<b>ICT – Use ICT systems</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
Interact with and use ICT systems to meet needs								
Store information								
Follow safety and security practices								
<b>ICT – Find and select information</b>								
Use simple searches to find information		✓						
Select relevant information that matches requirements of given task		✓						

<b>Entry 3</b>	<b>Unit number</b>							
<b>ICT – Develop, present and communicate information</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
Enter and develop different types of information to meet given needs								
Bring together different types of information								

<b>Level 1</b>	<b>Unit number</b>									
<b>English – Speaking and listening</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>English – Reading</b>										
Read and understand a range of straightforward texts								✓		
<b>English – Writing</b>										
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience								✓		

<b>Level 1</b>	<b>Unit number</b>									
<b>English – Speaking and listening</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>English – Reading</b>										
Read and understand a range of straightforward texts									✓	✓
<b>English – Writing</b>										
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience					✓				✓	✓

<b>Level 1</b>	<b>Unit number</b>							
<b>English – Speaking and listening</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓	✓	✓	✓	✓	✓
<b>English – Reading</b>								
Read and understand a range of straightforward texts		✓	✓					
<b>English – Writing</b>								
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience		✓	✓					

<b>Level 1</b>	<b>Unit number</b>									
<b>Mathematics – Learners can</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<b>Representing</b> <ul style="list-style-type: none"> <li>• understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine</li> <li>• identify and obtain necessary information to tackle the problem</li> <li>• select mathematics in an organised way to find solutions</li> </ul>										
<b>Analysing</b> <ul style="list-style-type: none"> <li>• apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes</li> <li>• use appropriate checking procedures at each stage</li> </ul>										
<b>Interpreting</b> <ul style="list-style-type: none"> <li>• interpret and communicate solutions to practical problems, drawing simple conclusions</li> </ul>										

<b>Level 1</b>	<b>Unit number</b>									
<b>Mathematics – Learners can</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
<b>Representing</b> <ul style="list-style-type: none"> <li>• understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine</li> <li>• identify and obtain necessary information to tackle the problem</li> <li>• select mathematics in an organised way to find solutions</li> </ul>										
<b>Analysing</b> <ul style="list-style-type: none"> <li>• apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes</li> <li>• use appropriate checking procedures at each stage</li> </ul>										
<b>Interpreting</b> <ul style="list-style-type: none"> <li>• interpret and communicate solutions to practical problems, drawing simple conclusions</li> </ul>										✓

<b>Level 1</b>	<b>Unit number</b>							
<b>Mathematics – Learners can</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
<b>Representing</b> <ul style="list-style-type: none"> <li>• understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine</li> <li>• identify and obtain necessary information to tackle the problem</li> <li>• select mathematics in an organised way to find solutions</li> </ul>								
<b>Analysing</b> <ul style="list-style-type: none"> <li>• apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes</li> <li>• use appropriate checking procedures at each stage</li> </ul>								
<b>Interpreting</b> <ul style="list-style-type: none"> <li>• interpret and communicate solutions to practical problems, drawing simple conclusions</li> </ul>								

<b>Level 1</b>	<b>Unit number</b>									
<b>ICT – Use ICT systems</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
Identify the ICT requirements of a straightforward task								✓		
Interact with and use ICT systems to meet requirements of a straightforward task in a familiar context										
Manage information storage										
Follow and demonstrate understanding of the need for safety and security practices					✓			✓		
<b>ICT – Find and select information</b>										
Use search techniques to locate and select relevant information										
Select information from a variety of ICT sources for a straightforward task										
<b>ICT – Develop, present and communicate information</b>										
Enter, develop and refine information using appropriate software to meet the requirements of straightforward tasks								✓		
Use appropriate software to meet requirements of straightforward data-handling task										
Use communications software to meet requirements of a straightforward task										
Evaluate the selection and use of ICT tools and facilities used to present information										
combine information within a publication for a familiar audience and purpose										
Evaluate own use of ICT tools										



<b>Level 1</b>	<b>Unit number</b>									
<b>ICT – Use ICT systems</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
Identify the ICT requirements of a straightforward task					✓					
Interact with and use ICT systems to meet requirements of a straightforward task in a familiar context										
Manage information storage										
Follow and demonstrate understanding of the need for safety and security practices					✓					
<b>ICT – Find and select information</b>										
Use search techniques to locate and select relevant information										
Select information from a variety of ICT sources for a straightforward task										
<b>ICT – Develop, present and communicate information</b>										
Enter, develop and refine information using appropriate software to meet the requirements of straightforward tasks					✓					
Use appropriate software to meet requirements of straightforward data-handling task										
Use communications software to meet requirements of a straightforward task										
Evaluate the selection and use of ICT tools and facilities used to present information										
combine information within a publication for a familiar audience and purpose										
Evaluate own use of ICT tools										

<b>Level 1</b>	<b>Unit number</b>							
<b>ICT – Use ICT systems</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>
Identify the ICT requirements of a straightforward task								
Interact with and use ICT systems to meet requirements of a straightforward task in a familiar context								
Manage information storage								
Follow and demonstrate understanding of the need for safety and security practices								
<b>ICT – Find and select information</b>								
Use search techniques to locate and select relevant information		✓	✓					
Select information from a variety of ICT sources for a straightforward task		✓	✓					
<b>ICT – Develop, present and communicate information</b>								
Enter, develop and refine information using appropriate software to meet the requirements of straightforward tasks								
Use appropriate software to meet requirements of straightforward data-handling task								
Use communications software to meet requirements of a straightforward task								
Evaluate the selection and use of ICT tools and facilities used to present information								
combine information within a publication for a familiar audience and purpose								
Evaluate own use of ICT tools								

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