

# Administration (Business Professional)

<b>Unit Title:</b>	<b>Reviewing and developing office procedures</b>
OCR unit number:	21
Level:	3
Credit value:	6
Guided learning hours:	54
Unit reference number:	L/505/7059

## Unit purpose and aim

This unit aims to equip candidates with the knowledge, understanding and skills needed to maintain, review and develop office procedures.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Understand administrative office procedures within a business environment</p>	<p><b>The Learner can:</b></p> <p>1.1 Identify office procedures within a business environment</p> <p>1.2 Identify the steps within these office procedures</p> <p>1.3 Analyse the rationale for having these administrative procedures</p>	<p>Types of procedures:</p> <ul style="list-style-type: none"> <li>• filing</li> <li>• photocopying</li> <li>• stock control</li> <li>• reception/telephone</li> <li>• incoming and outgoing post</li> <li>• handling customer complaints</li> <li>• processing sales orders</li> <li>• health and safety</li> </ul> <p>Procedures:</p> <ul style="list-style-type: none"> <li>• broken down into steps that can be easily followed</li> <li>• each step is a single task that is performed</li> </ul> <p>Factors that influence the structure of the procedure:</p> <ul style="list-style-type: none"> <li>• resources – time, equipment and cost</li> <li>• legal regulations and restrictions</li> <li>• staff using the procedures</li> <li>• safety regulations</li> <li>• technology</li> <li>• external changes</li> <li>• quality awards such as liP, ISO 9000</li> </ul> <p>Rationale:</p> <ul style="list-style-type: none"> <li>• needed to achieve stated outcomes/objectives</li> <li>• enable people to work efficiently and effectively</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>1.4 Explain ways in which these office procedures are maintained</p> <p>1.5 Explain ways in which these procedures can be reviewed</p>	<ul style="list-style-type: none"> <li>• ensures completion of a specific task/operation is carried out in an identical way</li> <li>• the quality of the completed work should be at the same standard – quality is therefore higher</li> <li>• when undertaking training programmes, staff follow instructions which are clear and easy to follow</li> <li>• Procedures manual: <ul style="list-style-type: none"> <li>– step-by-step instructions</li> <li>– flowcharts</li> <li>– pictures</li> <li>– narrative</li> </ul> </li> <li>• Training staff: <ul style="list-style-type: none"> <li>– demonstrations</li> <li>– question and answer sessions</li> <li>– feedback</li> </ul> </li> <li>• Use of schedules: <ul style="list-style-type: none"> <li>– checklist to ensure everything is included</li> <li>– ensures procedure followed correctly</li> <li>– easy to refer to again</li> </ul> </li> <li>• Use of tracking documents: <ul style="list-style-type: none"> <li>– can be computer or paper-based</li> <li>– computer-based ensures access for all users</li> <li>– useful if more than one person involved in a procedure</li> <li>– ensures nothing is missed</li> <li>– reduces the chances of delays</li> </ul> </li> </ul> <p>Reviewing procedures:</p> <ul style="list-style-type: none"> <li>• Are procedures still needed?</li> <li>• Are they still cost-effective?</li> <li>• Are they continuing to work effectively?</li> <li>• Are staff still following the procedure?</li> <li>• Is the quality of work being maintained?</li> </ul> <ul style="list-style-type: none"> <li>• Do they continue to meet current legislation</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<ul style="list-style-type: none"> <li>• Have changes in technology or equipment led to changes to procedures or a need for new procedures</li> <li>• Are minor adjustments needed</li> <li>• Have changes in working practices affected procedures</li> <li>• Does procedure have a logical progression</li> <li>• Is successful completion of objectives always achieved</li> </ul> <p>Legal requirements:</p> <ul style="list-style-type: none"> <li>• consult current legislation</li> </ul> <p>Ensure legislation, e.g. health and safety, is being followed</p> <p>Timescales:</p> <ul style="list-style-type: none"> <li>• check timescales are still relevant and appropriate</li> </ul> <p>Quality control:</p> <ul style="list-style-type: none"> <li>• check the end result/product</li> <li>• consider random or sample checking</li> <li>• TQM systems</li> </ul> <p>Internal audits:</p> <ul style="list-style-type: none"> <li>• regular check to ensure procedures are still relevant and working correctly</li> <li>• can involve observation, consultation with users and quality control</li> <li>• complex procedures may require external experts</li> <li>• recommendations on amendments or updates needed</li> </ul> <p>External quality assurance procedures:</p> <ul style="list-style-type: none"> <li>• Investors in People (IiP)</li> <li>• ISO 9000</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>2 Be able to review office procedures within a business environment</p>	<p>2.1 Critically review office procedures</p> <p>2.2 Suggest improvements to these office procedures</p>	<ul style="list-style-type: none"> <li>• Evaluate effectiveness</li> <li>• Identify appropriate methods of research</li> <li>• Identify appropriate consultations including liaising with relevant users of the procedure/outcomes of the procedure</li> <li>• Evaluate relevant documentation</li> <li>• Identify strengths/weaknesses of procedures</li> <li>• Difference between weaknesses and omissions</li> <li>• Sources of weaknesses and omissions</li> <li>• Consequences of the weaknesses or omissions</li> </ul>
<p>3 Be able to produce draft administrative procedures</p>	<p>3.1 Develop administrative procedures in accordance with organisational requirements</p>	<ul style="list-style-type: none"> <li>• Obtain authority to improve/draft new procedures</li> <li>• The importance of fitness for purpose</li> <li>• Rationale for improvements/new procedures</li> <li>• Factors to be considered in the design of new/amended procedures</li> <li>• Ensure the appropriate planning</li> <li>• Ensure sensible and realistic timescales for change</li> <li>• Amend/create new documentation</li> <li>• Communication of plans to relevant people at appropriate times</li> <li>• Obtain feedback and approval</li> <li>• Test revised/new procedure</li> <li>• Assess the expense of change</li> <li>• Identify additional resource needs</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
4 Be able to implement new administrative procedures	4.1 Analyse development requirements  4.2 Develop a training plan for staff to help implement improvements	<ul style="list-style-type: none"> <li>• Identifying staff training requirements</li> <li>• Identifying areas of ongoing support for staff</li> <li>• Drawing up training and support plans</li> <li>• Delivery of training and implementation of support</li> </ul>

## Assessment

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

## Guidance on assessment and evidence requirements

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

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

Please refer to the model assignment for this unit which can be found on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk).

## Additional information

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