

Model Assignment

Issued September 2011

OCR Administration (Business Professional)

UNIT 13 (LEVEL 2) - ORGANISE MEETINGS

Please note:

This OCR model assignment may be used to provide evidence for the unit above. Alternatively, centres may wish to adapt this assignment or devise their own assignment for the purposes of assessment. It is the centre's responsibility to ensure that any adaptations made to this assignment allow learners to meet all the assessment criteria and provide them with sufficient opportunity to demonstrate achievement across the unit.

This unit has a credit value of 3 on the Qualifications and Credit Framework (QCF). The scheme codes for the OCR Administration (Business Professional) qualifications towards which successful completion of this unit assessment may contribute are:

OCR Scheme code	Qualification Title	Qualification Accreditation Number (QAN)
03952	OCR Level 1 Award in Administration (Business Professional)	500/6124/0
03953	OCR Level 1 Certificate in Administration (Business Professional)	500/6122/7
03954	OCR Level 1 Diploma in Administration (Business Professional)	500/6123/9
03956	OCR Level 2 Certificate in Administration (Business Professional)	500/6563/4
03957	OCR Level 2 Diploma in Administration (Business Professional)	500/6125/2
03958	OCR Level 3 Award in Administration (Business Professional)	500/6483/6
03959	OCR Level 3 Certificate in Administration (Business Professional)	500/6484/8
03963	OCR Level 3 Diploma in Administration (Business Professional)	500/6485/X

The QCA Accreditation Number for this unit is: M/502/3826

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

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G354 11-09

Model Assignment: Tutor Information

OCR Administration (Business Professional)

UNIT 13 (LEVEL 2) - ORGANISE MEETINGS

Introduction to the Tasks

The tasks have been designed to enable learners to demonstrate their skills, knowledge and understanding of professional administration in the business world. This assignment allows learners to organise a meeting to a brief. They will book the venue, draft and finalise an agenda, produce supporting documentation for the meeting, keep accurate pre-meeting records and carry out pre-meeting checks before the meeting starts.

Please note: assessors will need to complete a Witness Statement for Tasks 2 to 4, primarily to evidence Assessment Criteria 5.1 and 5.2. As it is likely that centres may assess candidates on all tasks in a short period of time, assessors **do not** need to complete a separate Witness Statement for each task. (Although assessors may complete a separate Witness Statement for each task, if this fits better with how and when the tasks are performed and assessed.)

However, a Witness Statement **must** be completed for each learner, tasks must be completed separately and assessors must state clearly on each form which tasks and Assessment Criteria are being evidenced. Assessors will need to complete a Witness Statement for each learner.

The tasks have been designed so that all of the assessment criteria in Unit 13 are addressed. This unit could be linked to Unit 19 (Supporting Meetings) or Unit 27 (Chair a Meeting).

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

The Tasks

Task 1: Make arrangements

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

In this task, learners will make the arrangements to book the meeting based on the scenario they have been set. However, if learners have access to a real meeting then the tasks could be adapted. Learners will need to have knowledge of how to establish the purpose, date, time, attendees, location and facilities required for a meeting before they start the assessment.

Learners will need to read the scenario and pick out the key information which is required for the meeting. Once they have established these requirements they will then book and confirm appropriate meeting room facilities.

The meeting brief identifies factors which impact on the location of the meeting and learners must fully consider the requirements for the meeting from the brief. This will include any special requirements for the delegates and any equipment required.

You, or a suitable supervisor, should act as the line manager (Jo Anderson, Northern Regional Manager) and learners will need to liaise with you to check that they have correctly interpreted the brief and identified the requirements for the meeting. Learners should check the availability of the correct room - as one of the delegates has a broken leg and will struggle to get up the stairs, learners should identify the room on the ground floor for the booking.

Learners will need to confirm the meeting room booking and include the required facilities for the meeting – evidence for this could be via email (a generic email address could be provided to learners), memo or letter or through a role play telephone conversation which could be evidenced through a Witness Statement (please adapt the generic Witness Statement from the Centre Handbook if using one for this task).

A variety of evidence can be presented here eg notes of discussion, draft documents, memos/letters/emails or Witness Statement.

Task 2: Produce supporting documentation for the meeting

Assessment Criteria 2.1, 2.2, 5.1, 5.2 and 6.1 are assessed in this task.

Learners will produce the supporting documentation for the meeting in this task. They may need to liaise with you as the line manager to obtain details for the agenda. Learners have been provided with a copy of the minutes of the previous meeting and they should use this to draft the agenda. The brief also provides details that are required for this meeting and learners should identify the information they require and then come to you with a draft copy of the agenda for checking.

They will produce an accurate notice of meeting which will conform to standard layout and conventions. This should be checked and agreed with you as the line manager before it is distributed to the delegates.

Once both documents have been approved these will need to be circulated to the attendees that have been listed in the scenario along with a copy of the minutes of the previous meeting. These should be distributed at least seven days before the meeting date. How these documents are distributed are up to you and a pack could be produced along with memo sending the information via post or they could be sent via email to an email address you have created.

Throughout this task you will need to check with learners that they have maintained the confidentiality of the meeting documents. Learners should ensure that they keep all written information secure and that they select a secure, appropriate method for circulating the documents.

Evidence will be the draft agenda, agenda, notice of meeting, a Witness Statement and any other work products.

Task 3: Keep accurate pre-meeting records

Assessment Criteria 3.1, 3.2, 5.1 and 5.2 are assessed in this task.

In this task, learners will be required to keep accurate pre-meeting records. The brief identifies who will and who will not be attending the meeting and any special requirements that are required for the meeting.

Learners should prepare a list of attendees and keep this updated. They should also keep a list of the responses and provide you with a final update as to who will or will not be attending the meeting.

Learners will need to inform the venue of the special dietary requirements of Paul Smith who is a vegetarian (as identified in the brief). Although the brief does not particularly request food, for the purpose of this role play, it would be appropriate to advise the venue that any refreshments must include a vegetarian option. Learners should either ring the venue or send them an email. The telephone conversation could be set up as a role play or you could provide learners with a suitable email address.

Learners must ensure that they maintain confidentiality throughout this task.

Evidence will be the list the notes of apologies for absence, list of attendees and completed Witness Statement.

Task 4: Carry out pre-meeting checks

Assessment Criteria 4.1, 4.2, 5.1 and 5.2 are assessed in this task.

In this task, learners will be required to keep accurate pre-meeting records. You (as Jo Anderson, the line manager) will need to pass to the learners a copy of Appendix A which is a document which is to be presented at the meeting.

Learners will need to check with you that there have been no other changes to any of the meeting requirements and they should provide you with an up to date record of attendees before the meeting.

Learners should check with the venue that all the requirements have been booked. This could be carried out as a role play and you so that details can be confirmed.

Learners should pass to you all the documents, items and facilities which are required for the meeting.

Evidence should be notes, completed Witness Statement and copies of all meeting documents.

Scope of permitted Model Assignment modification

The model assignment is self-contained in its present form. The set of tasks form a coherent whole addressing all the Assessment Criteria [AC].

No changes to the Assessment Criteria are permitted. However, the model assignment can be changed in terms of the introductory scenario, which can be contextualised or amended. The scenario must still be set within a business context and must have a clear business purpose/objective.

The following would remain broadly the same, providing a common structure for the range of model assignments produced:

- individual learners' evidence for practical activities
- controls for task taking
- links to other unit assignments, learning and work experience

If modifications are made to the model assignment it is up to the centre to ensure that all assessment criteria are adequately covered.

Checklist of types of evidence

When completing this model assignment it may be possible to generate evidence for completing a task in a variety of formats. This list is not exhaustive and will depend on the approach taken to complete the task or model assignment. In some cases the task will require a specific format for the outcome and this will be clearly marked in the table with these items in bold.

Task activity	Examples of evidence – specifically required items in bold	Assessment Criteria coverage
Task 1 Make arrangements	<ul style="list-style-type: none"> • Notes • Confirmation of booking 	Assessment Criteria <ul style="list-style-type: none"> • 1.1 • 1.2 • 1.3 • 1.4
Task 2 Produce supporting documentation for the meeting	<ul style="list-style-type: none"> • Notice of meeting • Agenda • Completed Witness Statement 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 5.1 • 5.2 • 6.1
Task 3 Keep accurate pre-meeting records	<ul style="list-style-type: none"> • Notes of apologies for absence • List of attendees • Completed Witness Statement 	Assessment Criteria <ul style="list-style-type: none"> • 3.1 • 3.2 • 5.1 • 5.2
Task 4 Carry out pre-meeting checks	<ul style="list-style-type: none"> • Notes • Completed Witness Statement • Copies of all meeting documents 	Assessment Criteria <ul style="list-style-type: none"> • 4.1 • 4.2 • 5.1 • 5.2

Witness Statement – Tasks 2, 3 & 4

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

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

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

AC 5.1 & 5.2	<input type="checkbox"/> Task 2 – Make arrangements <input type="checkbox"/> Task 3 – Produce supporting documentation for the meeting <input type="checkbox"/> Task 4 – Carry out pre-meeting checks
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LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

Assessment Criteria 5.1	
Describe ways in which documents can be distributed while maintaining confidentiality	
Assessor comments	
Assessment Criteria 5.2	
Explain how meeting documents can be kept confidential and secure	
Assessor comments	

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GENERAL COMMENTS

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

Signed (Witness): _____

Name and position _____

Date: _____

Model Assignment: Learner Information

OCR Administration (Business Professional)

UNIT 13 (LEVEL 2) - ORGANISE MEETINGS

Q *Do I have to pass this assignment?*

A Yes. You must pass this assignment to achieve the unit.

Q *What help will I get?*

A Your tutor will help you when completing the OCR model assignment and will make sure that you know what resources/facilities you need and are allowed to use.

Q *What if I don't understand something?*

A It is your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *Can I use other people's work?*

A No. The work that you produce must be your own and you may be asked to sign a declaration confirming this. You should never copy the work of other learners or allow other learners to copy your work. Any information that you use from other sources, e.g. books, newspapers, professional journals or the Internet must be clearly identified and not presented as your own work.

Q *Can I work in a group?*

A Yes. However, if you work in a group at any stage you must still produce work that shows your individual contribution.

Q *How should I present my work?*

A You can present your work in a variety of ways, e.g. hand-written, word-processed, on video. However, what you choose should be appropriate to the task(s) and agreed with your tutor. For some work, e.g. presentations, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet will usually be used for this. If you are unsure, check with your tutor.

Q *When I have finished, what do I need to hand in?*

A You need to hand in the work that you have completed for each task. Do not include any draft work or handouts unless these are asked for. When you hand in your work make sure that it is has your name and the unit title clearly marked and that it is in the correct order for assessment.

Q *How will my work be assessed?*

A Your work will be marked by an assessor in your centre. The assessor will mark the work using the assessment objectives in the qualification specification. The work will then be sent to an OCR Moderator to ensure that assessors from all centres are marking correctly. You have not passed this unit until this is confirmed by OCR.

Q *Will my work be returned?*

A Submitted work will not be returned so please ensure you keep copies of everything you produce.

Scenario

Organise Meetings

You are currently on work placement as an administrative assistant at Berry Sweet Fruity, a smoothie franchise company. Jo Anderson, Northern Regional Manager, has asked you to arrange the next quarterly meeting of the northern region franchisees.

The meeting should take place at Berry Sweet Fruity Regional Office, Victoria House, Cathedral Walk, Leeds, LS1 4JP within the next four weeks. The meeting is usually held in Room 1, which is located on the first floor. However, Room 6 on the ground floor is also available for the meeting. As the regional office is situated in a listed building, there is no lift to the second floor.

Jo has told you to include the standard agenda items, plus:

- new products
- a review of what is selling well and not so well in each of the franchise areas
- suggestions for future products.

Jo has told you that Tuesday mornings are a good time to hold the meeting and that she needs a laptop and projector and a flipchart for next meeting.

The current franchisees in the region are:

- Jasminder Khan, Newcastle North
- Paul Smith, Newcastle South – Paul is a vegetarian
- Allyson Keyes, Durham Central – Allyson has asked if she could raise environmentally friendly packaging as an agenda item as she has found some information she would like to share with others in the region
- Jason Barker, Teeside Central
- Christopher Tarn, Harrogate – Christopher would like to discuss fair trade products
- Amanda Edgar, Morley

Jason Barker has telephoned to say that he is now back at work following his ski-ing accident but his leg will be in plaster for the next six weeks and has therefore requested the meeting take place on the ground floor.

Jasminder has just telephoned to say that she has no cover and is unable to attend any meetings at head office for the next month.

Tasks

Task 1: Make arrangements

Assessment Criteria 1.1, 1.2, 1.3 and 1.4

Your task is to:

- establish the purpose, date, time, attendees and location for the meeting
- establish the facilities required for the meeting
- book an appropriate meeting room and the required facilities for the meeting.

Your evidence will be:

- your notes
- confirmation of the booking.

Task 2: Produce supporting documentation for the meeting

Assessment Criteria 2.1, 2.2, 5.1, 5.2 and 6.1

Your task is to:

- produce a notice of meeting
- produce an agenda
- circulate these documents, together with the minutes of the previous meeting, to attendees at least seven working days before the meeting
- maintain the confidentiality of meeting documents.

Your evidence will be:

- notice of meeting
- agenda
- completed Witness Statement.

Task 3: Keep accurate pre-meeting records

Assessment Criteria 3.1, 3.2, 5.1 and 5.2

Now that the notice and agenda of meeting has been circulated you need to keep accurate pre-meeting records.

Your task is to:

- record apologies for absence
- prepare a list of attendees
- maintain the confidentiality of meeting documents.

Your evidence will be:

- notes of apologies for absence
- list of attendees
- completed Witness Statement.

Task 4: Carry out pre-meeting checks

Assessment Criteria 4.1, 4.2, 5.1 and 5.2

Jo has passed to you a document which is to be presented at the meeting (Appendix A).

Your task is to:

- carry out pre-meeting checks and preparations
- provide all documents, items and facilities required for the meeting
- maintain the confidentiality of meeting documents.

Your evidence will be:

- notes
- completed Witness Statement
- copies of all meeting documents.

APPENDIX A – Document to be presented by Jo Anderson at the meeting

BERRY SWEET FRUITY

The company is pleased to announce that it is to launch flavoured iced coffees, in addition to the smoothies that are currently sold.

The flavoured iced coffees will be available in small, regular and large sizes. These will only be available at some of the outlets for a trial period.



APPENDIX B - Minutes of previous quarterly meeting

BERRY SWEET FRUITY

QUARTERLY MEETING

The quarterly meeting of Northern Franchisees was held on in Room 6.

In attendance: J Anderson (Chair), P Smith, A Keyes, J Khan, C Tarn, A Edgar

1 Welcome

Jo welcomed everyone to the meeting and in particular Amanda Edgar.

2 Apologies for Absence

Apologies for absence were received from Jason Barker.

3 Minutes of Previous Meeting

These were confirmed as correct.

4 Matters Arising

There were no matters arising.

5 Progress towards annual set targets

Newcastle North	85%
Newcastle South	65%
Durham Central	93%
Teesside Central	105%
Harrogate	118%
Morley	0%

6 Product Review

Banana and lychee smoothie not selling well. Product to be withdrawn.

7 Marketing

Regional marketing campaign planned for next year.

8 Any other business

There was no other business.

9 Date of next meeting

To be confirmed in due course.

Learner Evidence Checklist

OCR Administration (Business Professional)

UNIT 13 (LEVEL 2) - ORGANISE MEETINGS

LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> notes	
<input type="checkbox"/> confirmation of the booking	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> notice of meeting	
<input type="checkbox"/> agenda	
<input type="checkbox"/> completed Witness Statement	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> notes of apologies for absence	
<input type="checkbox"/> list of attendees	
<input type="checkbox"/> completed Witness Statement	

Task 4 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> notes	
<input type="checkbox"/> completed Witness Statement	
<input type="checkbox"/> copies of all meeting documents	

I confirm that the items listed above are attached. These have been assessed and provide sufficient evidence to demonstrate that the learner has achieved all of the assessment criteria for this unit.

Signed: _____

Name and position _____

Date: _____