Higher National Unit specification

General information for centres

Unit title: Managing Administrative Services

Unit code: F3FM 35

Unit purpose: The purpose of this Unit is to develop the candidate's ability to manage administrative services and to critically evaluate their contribution to the organisation's administrative functions and to the organisation as a whole.

On completion of the Unit the candidate should be able to:

1   Maintain and evaluate systems for managing resources within an organisation.
2   Contribute to the induction and continuing training and development needs of colleagues.
3   Contribute to quality control and quality improvement within the administration area of the organisation.
4   Demonstrate the use of budgetary control techniques within an organisation.
5   Organise and support events and meetings.

Credit points and level: 2 HN credits at SCQF level 8: (16 SCQF credit points at SCQF level 8*)

*SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.

Recommended prior knowledge and skills: While access to this Unit is at the discretion of the centre, candidates would benefit from having been employed in a senior administrative role or having attained previous administrative qualifications such as HNC Administration and Information Technology. Candidates should have good IT skills and Communication skills at SCQF level 5 or above.

Core Skills: There are opportunities to develop the Core Skills of *Information Technology, Working with Others, Communications* and *Problem Solving* at SCQF level 6 and *Numeracy* at SCQF level 5 in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

Context for delivery: If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

General information for centres (cont)

Assessment: Outcomes 1, 2 and 3 could be assessed using portfolio evidence either from the candidate's workplace or from responses to case study materials. Outcomes 4 and 5 could be assessed using an event as a project and showing evidence of the arrangements for the event, the meetings leading up to the event and the budgetary checks related to the event. An evaluation of the success of the event should be included.

Higher National Unit specification: statement of standards

Unit title: Managing Administrative Services

Unit code: F3FM 35

The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Candidates should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

Outcome 1

Maintain and evaluate systems for managing resources within an organisation

Knowledge and/or Skills

♦ Stock control systems
♦ Data management systems
♦ Staffing requirements and rotas
♦ Equipment

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can: maintain and evaluate systems in use in an organisation and suggest improvements to increase their effectiveness.

Evidence should include a minimum of two organisational systems being:

♦ updated accurately in accordance with organisational procedures
♦ monitored to ensure compliance, on a regular basis with a minimum of two instances of monitoring being submitted
♦ action taken where appropriate and
♦ systems evaluated on an on-going basis with any emerging issues being communicated to appropriate staff

Additionally at least one instance of where the organisation would benefit from a more systematic approach should be identified, a possible solution suggested together with costs and benefits to the organisation.

Higher National Unit specification: statement of standards

Unit title: Managing Administrative Services

Assessment Guidelines

Candidates could compile evidence from their own workplace or where this is not possible or appropriate, could be given case study materials and practical data to input and monitor on an ongoing basis. Candidates could then be asked to evaluate the effectiveness of the system in use and to identify possible improvements.

Outcome 2

Contribute to the induction and continuing training and development needs of colleagues

Knowledge and/or Skills

- ♦ Induction process
- ♦ Training needs analysis
- ♦ Training plan
- ♦ Demonstration techniques
- ♦ Monitoring and feedback techniques
- ♦ Evaluation techniques
- ♦ Mentoring techniques

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can: provide evidence of contributing to the induction and training and development needs of colleagues. Evidence should include:

- ♦ an outline of the candidate's contribution to the induction process with clearly assigned roles and responsibilities of those involved
- ♦ a training needs analysis for a minimum of two different members of staff concerning activities under the control of the candidate
- ♦ a minimum of two training plans which outline different activities, timelines and mentoring available to those being trained
- ♦ a minimum of one demonstration and feedback session which should be recorded on an observation schedule
- ♦ a minimum of two evaluations of the training sessions which have taken place, at least one of which should include suggested improvements
- ♦ a log of the mentoring and activities undertaken by the candidate to help support those being trained

Candidates should provide this information in a format which is logical and consistent and in a way which can be used for the trainees' continuing professional development records. Information should also meet organisational requirements.

Higher National Unit specification: statement of standards (cont)

Unit title: Managing Administrative Services

Assessment Guidelines

Candidates could compile evidence from their own workplace or where this is not possible or appropriate, could be given case study materials. Case study materials could be for an inductee as well as an existing member of staff and should require candidates to role play demonstration techniques as well as explanations and to answer questions. Candidates using case study materials would be required to evaluate the success of the training and induction process and to suggest possible improvements to the session in at least one case. In a role play situation it is suggested that a simulated office environment is used to carry out this activity. This Outcome could be linked with Outcome 3. See suggested Assessment Guidelines for Outcome 3.

Outcome 3

Contribute to quality control and quality improvement within the administration area of the organisation

Knowledge and/or Skills

♦   Quality systems
♦   Quality control techniques
♦   Quality improvement techniques

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can summarise clearly and concisely the main purposes and principles of a Quality Management System. This summary should include:

♦   an outline of the system and its purpose including an outline of the documentation involved
♦   a clear indication of how each part of the quality cycle is carried out in the system
♦   identification and explanation of the quality control techniques used to ensure effective working of the system within the administration area

Candidates should provide evidence to show that they have contributed to the quality control process and have identified where quality can be improved. Evidence should also include proposals about how these suggested improvements could be implemented.

Assessment Guidelines

Candidates could be asked to compile a simple users guide to dealing with a quality management system for those new to the organisation. This could be linked with Outcome 2 (see Guidance on Content for Outcome 2).

Candidates could compile evidence from their own workplace or where this is not possible or appropriate, could be given case study materials. Candidates using case study materials would be required to give detailed suggestions for improvement and methods of implementing the improvements identified. Those providing workplace evidence could provide a paper or electronic paper trail. This could be authenticated through individual interview.

Higher National Unit specification: statement of standards (cont)

Unit title: Managing Administrative Services

Outcome 4

Demonstrate the use of budgetary control techniques within an organisation

Knowledge and/or Skills

♦ Budget setting techniques
♦ Budget control techniques
♦ Action planning
♦ Statistical techniques
♦ Spreadsheets

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can use a spreadsheet to:

♦ set a budget in accordance with guidelines given which should require the candidate to investigate a minimum of 12 regular costs and allow for a given % increase in prices, a requirement to estimate costings for at least two special events with similar events of a different size as the basis for the calculations and an amount for contingencies based on previous years. The budget should be ordered in a logical way showing accurate subtotals for each category of cost.
♦ use appropriate statistical methods to ensure the budget is kept on track.
♦ plan and carry out actions if the budget is not on track.
♦ use statistical techniques to forecast accurately.

Candidates should be able to explain any deviation from the original budget and to justify the use of the actions taken to keep the budget on track. The budget should be maintained over a period of a minimum of three months.

Assessment Guidelines

Candidates could be asked to set up a spreadsheet to record and predict budget requirements for an office situation. This could for example be an overall budget for stationery and could be based on previous years' figures, predictions of special requirements and predicted costs. Alternatively a budget for staffing could be used which takes into account, temporary staff requirements as well as regular staffing needs.

Candidates could compile evidence from their own workplace or where this is not possible or appropriate, could be given case study materials. Candidates using case study materials would be required to set up a spreadsheet with predictive statements such as IF statements. Those candidates providing workplace evidence would require to explain how the spreadsheet is set up and how warning statements are used. Those providing workplace evidence could provide a paper or electronic paper trail.

Higher National Unit specification: statement of standards (cont)

Unit title: Managing Administrative Services

Outcome 5

Organise and support events and meetings

Knowledge and/or Skills

♦ Planning techniques
♦ Communication techniques
♦ Minutes and reports
♦ Evaluation techniques

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can: organise events and meetings and provide information to enable decisions to be made on venues, costing, seating, and catering. This evidence should be included in a portfolio which should also include:

♦ an event programme and an evaluation of the organisation of the event
♦ an agenda and minute of meeting as well as any other supporting documentation

Assessment Guidelines

Candidates could compile evidence from their own workplace or where this is not possible or appropriate, could be given case study materials. Candidates using workplace evidence should include meeting information from meetings which are held on a regular basis and should include event organisation information which is one-off. This workplace evidence could provide on paper or electronically and should be authenticated by the tutor through questioning and observation.

Where candidates are organising an event within a centre environment, care should be taken to ensure that each candidate is contributing to the event organisation. Meetings held to co-ordinate the event could form part of the assessment.

Administrative Information

Unit code: F3FM 35

Unit title: Managing Administrative Services

Superclass category: AB

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History of changes:

Version	Description of change	Date

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Higher National Unit specification: support notes

Unit title: Managing Administrative Services

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 80 hours.

Guidance on the content and context for this Unit

This Unit is one of the Core Units of the Professional Development Award in Administrative Management. It may also be undertaken as a stand-alone Unit which introduces candidates to the principal administrative functions or a senior administrator. It is designed to be undertaken by those who:

♦ are in employment and hold a senior administrative post
♦ have undertaken an HNC and wish to advance their studies or
♦ are returning to employment after a career break

Outcome 1 candidates will need to know about:

♦ Different types of stock control systems. How stock for administrative services ordered, stored, recorded and monitored and controlled.
♦ Data management systems. How is data stored, managed and monitored and controlled.
♦ Staffing requirements. How are staffing requirements determined, met, tracked and monitored. This should include work rotas and holiday rotas.

In each of the above systems candidates will need to know how to update systems, how to analyse and anticipate any potential problems and take appropriate action. Candidates should also evaluate systems and try to improve them on an on-going basis. Candidates should be encouraged to adopt an analytical approach to any systems already in use.

Outcome 2 candidates will need to know about:

♦ Induction process. Overview of the whole organisation and induction into the administration area.
♦ Training needs analysis. Identification of any skills gaps and what training is required.
♦ Training plans with dates, achievable targets and comments on performance.
♦ Demonstrating techniques using computers as well as office machinery.
♦ Monitoring and feedback techniques to encourage improved performance.
♦ Evaluating training which has taken place and suggesting any further training requirements identified.
♦ Mentoring techniques which could be used with learners and trainees.
♦ Organisational requirements for recording induction and continuing professional development records for example documents used for Investors in People accreditation.

This Outcome could be linked in with Outcome 3 as part of quality control and quality improvement. Also where this Outcome is assessed by means of role-play and case study, it could be linked to Outcome 1 for assessment purposes (see below under Guidance on Delivery and Assessment).

Higher National Unit specification: support notes (cont)

Unit title: Managing Administrative Services

Outcome 3 candidates will need to know about:

♦   Quality systems. National systems for example ISO 9001, Chartermark and Investors in People, as well as internal systems for Total Quality Management. What is their purpose and why are they useful eg lower costs, improved quality of the product, better reputation and greater market share. How are they maintained and the documentation involved — quality manuals, processes, procedures, quality plans, records and forms.
♦   Quality control techniques. Ways of ensuring quality standards are followed — audits, spot checks, sampling techniques.
♦   Quality improvement techniques. Reviews of processes and procedures, feedback from users and customers.

Outcome 4 candidates will need to know about:

♦   Budget setting techniques — working out quantities and costs and estimating overall budget requirements
♦   Budget control techniques — wastage, control of costs, stock flow requirements
♦   Planning actions — when to take action, what action to take
♦   Statistical techniques — comparing figures from previous information, comparing deviations from budget, forecasting techniques
♦   Spreadsheets — formulae, percentages, IF statements, candidates should be able to set up and input data into a complex spreadsheet with multiple pages, using enhancements to clarify figures

Outcome 5 candidates will need to know about:

♦   Planning — critical path, order of bookings, contingencies, confirmations, costs of cancellation
♦   Communication — reports, minutes, e-mail groups, presentation software, presentation techniques
♦   Minutes and Reports — taking notes at meetings, writing minutes and reports from notes, preparing papers for meetings, retaining copies of meeting papers
♦   Evaluation techniques — comparative costs, services, facilities

Guidance on the delivery and assessment of this Unit

The Unit is designed to develop the essential skills required of those holding a senior administrative post such as a Personal Assistant or an Office Manager. Delivery of the Unit could be:

♦   by short input sessions using on-line or open learning sessions or attendance at lectures followed by portfolio compilation sessions either individually or as a group. This would be best suited to those currently in employment in a senior role.
♦   through classroom sessions where each Outcome is taught, discussed and tested using case study methodology and is likely to include role plays. This method would be best suited to those who are following the course prior to employment or prior to returning to employment.

Where candidates have a significant amount of work in an area for example if they deal with meetings and organising events on a regular basis, they may not require any input in this area but could spend their time, compiling their portfolio of evidence.

Higher National Unit specification: support notes (cont)

Unit title: Managing Administrative Services

Outcome 1

There could be input sessions about stock control systems, data management systems and staffing recording systems and issues. These could be given in lecture format with practical exercises or in open learning short sessions followed by self assessment sessions.

Candidates could then:

♦ with the prior agreement of their employer and after discussion with their tutor, provide evidence from their own workplace to show their ability to update systems regularly, monitor recorded results and take appropriate action. They should also evaluate the system in use and suggest any changes they feel could benefit the organisation.

or

♦ Candidates could be given case study materials which requires them to update an existing stock control system and existing staffing information, monitor and react to the information and take action. For the second part, they could also be given a case study about data management and provide a report with recommendations or provide records on staffing or stock control.

Outcome 2

Delivery could be through lectures or short open learning sessions about induction and training processes. Candidates should be made familiar with different kinds of training records used by different organisations to record training undertaken and to provide feedback particularly to new employees and trainees. Candidates could then:

♦ with the prior agreement of their employer and after discussion with their tutor, provide evidence from their own workplace to show that they had organised an induction session and provided a training needs analysis and training plans for two people and had evaluated that training with suggestions for improvement. They would also have to keep a log of mentoring activities undertaken for these candidates. Where this method is used, assessors would wish to question not only the candidate but those who had been trained to authenticate the evidence provided.

or

♦ Candidates could provide the same evidence from case study and role plays undertaken in a simulated office environment. In this case this could be linked in with for example Outcome 1 where candidates could demonstrate to new students, how data is managed or how stock control is undertaken. Observation of the process as well as documentary evidence is recommended for authentication.

Higher National Unit specification: support notes (cont)

Unit title: Managing Administrative Services

Outcome 3

Candidates could be asked to research national system quality systems and these could be compared and contrasted. Where an in-house Quality Management System is used for assessment purposes, the centre should ensure that contact is made with the person responsible for quality to check that the information provided by the candidate is accurate. The intention is not for the candidate to provide quality manuals but to identify relevant parts of the manual for the administrative function. Evidence could be submitted in electronic format. Using workplace evidence should be agreed with the tutor and the organisation beforehand and should be authenticated through observation, questioning and interviewing.

Outcome 4

Candidates could be given examples of different kinds of budgets to input alter and set up to extend their skills in using spreadsheets for budgetary purposes. Their skills in analysis should be extended by expecting them to be able to read and comment on trends, targets and overspends and to accurately compare costs with other trading periods and sections of the business.

Although workplace evidence could be used in this Outcome it is more likely that a case study will be used to maintain confidentiality. This should be for a 3 month period and should involve contingencies and predictions.

Outcome 5

Workplace evidence would be ideal for this Outcome with candidates providing electronic or hard copy evidence of meetings and events supported in the workplace. Where necessary this could be supplemented by a case study of an event which has to be organised.

Candidates who do not have access to workplace evidence could agree to arrange a series of charity events which would entail, meeting as a committee to make decisions about the type of events, who would do what and organise the events. The regular meetings held could form part of the evidence with each candidate taking a different role at each meeting and each event.

Opportunities for developing Core Skills

Information Technology will be used throughout this Unit and where workplace evidence is used much of the portfolio of evidence is likely to be retained in electronic format. Spreadsheet use is likely to form an integral part of Outcome 1 and is an essential element of Outcome 4. Word processing is an essential part of each Outcome and research either from internal documentation or from external sources will form an essential element of Outcome 3. Throughout the Unit information will require to be filed and retrieved from different sources.

Throughout this Unit the skills of *Working with Others* is apparent. In particular candidates will have to show evidence of working with others in Outcomes 2, 3 and 5. In Outcome 2 contact is likely to be on a one-to-one basis while in Outcome 5, the candidate is likely to be working with a group of people. Outcome 3 is likely to be with small groups as well as individuals.

Higher National Unit specification: support notes (cont)

Unit title: Managing Administrative Services

Communication both oral and written is an integral part of this Unit. Explanations required for Outcome 2 and training and development plans will require candidates to summarise their intentions in a concise way. Evidence Requirements for Outcome 3 will require candidates to read, interpret and apply quality principles to their own area of work. Candidates will have to explain any deviations from budget in Outcome 4. Minutes and reports required for Outcome 5 necessitate the use of good business language skills and in this Outcome roles will have to be negotiated with others.

While some problem solving is required in all Outcomes, it is particularly apparent in Outcome 2 where the candidate will require to provide a solution to the inductee or trainees needs, in Outcome 3 where the candidate will need to devise ways of improving quality within the organisation and in Outcome 4 where budgets will need to be balanced.

In addition to Outcome 4 which will require the candidate to use arithmetic functions and a spreadsheet to work out percentages and any deviations from a given budget, *Numeracy* will be also required in Outcome 5 where costs, venues and catering will be compared. For example candidates could be given comparative venues with different kinds of quotes eg per person or for groups or for room, catering, facilities each priced separately and the candidate could be asked to determine the best deal.

Open learning

Much of the input of this Unit could be done through Open Learning. Input could be made in the form of short open learning sessions delivered on-line or in hard copy. Where portfolio compilation for assessment takes place in the workplace, this should be agreed with the delivering tutor and authenticated through visits and interviews with the candidate's employer.

Candidates with disabilities and/or additional support needs

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering alternative Outcomes for Units. Further advice can be found in the SQA document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (**www.sqa.org.uk**).

General information for candidates

Unit title: Managing Administrative Services

In this Unit you will learn how to help support an organisation's main administrative functions. There are five Outcomes in this Unit.

In Outcome 1you will learn about maintaining systems for managing resources. This means you will look at areas like stock control and use of staff hours and you will be expected not only to monitor figures available but to comment and evaluate the figures you have.

In Outcome 2 you will be expected to help others within your organisation by being involved in the induction process of new people starting in the organisation and helping to develop others in your area of expertise.

In Outcome 3 you will learn about quality systems and how you can help maintain and improve quality within an organisation — an increasingly important part of any organisation's work.

In Outcome 4 you will learn how to control your budget, work out quantities and costs and keep your records in a spreadsheet.

In Outcome 5 you will learn how to organise, support and record meetings and events. You will compare venues and costs and keep records of meetings and evaluate the organisation or events.

In undertaking this Unit you will extend you Core Skills that is your *Communication* skills, *IT* skills, *Numeracy* skills, skills of *Working with Others* and *Problem Solving* skills.

If you are already in employment, you may be able to use some evidence from your workplace towards your assessments. If you are undertaking this Unit as part of a centre-based course, you are likely to be tested through the use of case studies and role plays.