



Higher National Unit specification

General information for centres

Unit title: Administrative Management: Personal Skills

Unit code: F3FL 35

Unit purpose: This Unit is designed to develop the candidate's personal skills to contribute effectively to the management of an organisation. Successful completion of the Unit should equip the candidate with the essential skills required to work efficiently and effectively on their own and with others in an administrative capacity.

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

- 1 Demonstrate effective time management techniques.
- 2 Use planning and scoping techniques to help solve administrative problems.
- 3 Contribute to meetings through researching and presenting information and advice.
- 4 Evaluate situations and use skills to motivate others
- 5 Demonstrate flexibility and initiative in dealing with work and people.

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: Access to this Unit is at the discretion of the centre. However centres should ensure that candidates attempting this advanced Unit have experience of administrative work at a senior level and have sound prior knowledge of IT applications. Alternatively candidates could have attained the HNC Administration and Information Technology or equivalent qualification.

Core Skills: There are opportunities to develop the Core Skills of *Problem Solving, Information Technology, Communications* and *Working with Others* at SCQF level 6 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.

Assessment: Candidates will be required to produce a portfolio of evidence in the form of reports, minutes, storyboards and witness testimony. This can be produced from workplace evidence or from responses to case study materials.

Higher National Unit specification: statement of standards

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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

Demonstrate effective time management techniques

Knowledge and/or Skills

- ◆ Work schedules, priorities and deadlines
- ◆ Follow-up systems
- ◆ Diaries

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can: produce a portfolio of evidence to demonstrate effective recognition of priorities and deadlines and the development of subsequent work schedules which demonstrate the use of a variety of different time and task planning techniques. Evidence should include:

- ◆ tasks and projects of differing timescales
- ◆ the use of a follow-up system
- ◆ a minimum of one example of timelines being broken and renegotiated
- ◆ diary entries both electronic and paper-based of the candidate and others

Candidates should be able to justify and explain the priorities given to activities undertaken.

Assessment Guidelines

The assessment for this Outcome could be based on real workplace evidence and could include a longer term project for example over three months for which the candidate is responsible as well as regular monthly tasks which have to be done. Where workplace evidence is to be used, this should be discussed with the candidate's line manager and the ultimate decision as to suitability of the work evidence will rest with the centre.

Where it is not possible to use workplace evidence for assessment purposes then a simulated case study could be used. This should be provided by the centre. This case study may include role-play and well as explanations descriptions and activities.

Candidates could submit information in electronic format where appropriate or a mixture of paper-based information with references to further information which is held electronically. In addition to hard copy, evidence could include a candidate interview for authenticity purposes.

Higher National Unit specification: statement of standards (cont)

Unit title: Administrative Management: Personal Skills

Outcome 2

Use planning and scoping techniques to help solve administrative problems.

Knowledge and/or Skills

- ◆ Negotiation techniques
- ◆ Methods of planning and co-ordinating tasks and time
- ◆ Methods of tracking tasks and time
- ◆ Evaluation techniques

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can produce a portfolio of evidence which includes planning, scoping the content of tasks, co-ordinating and negotiating with others to help solve administrative problems. The evidence should include:

- ◆ a minimum of two different types of administrative tasks being defined with milestones accurately identified and dependencies recognised. These tasks should both include activities which are dependant on work being completed by others. At least one of the tasks should require the candidate to fit in with priorities set by others.
- ◆ a minimum of one example of timelines being broken and re-negotiated with evidence of how this was tracked and controlled.
- ◆ lessons learned in at least one task.

The projects used as the basis of the planning and scoping should be complex and should include, start dates, finish dates, staffing requirements and resource requirements as well as identification of major risks involved in non-completion.

Assessment Guidelines

The assessment for this Outcome could be based on real workplace evidence and could include a longer term project for example over three months for example a conference which has to be planned. The evidence could also include regular monthly tasks which have to be done and/or a one-off task which requires administrative support. Where workplace evidence is to be used, this should be discussed with the candidate's line manager. The ultimate decision as to suitability of the work evidence will rest with the presenting centre and arrangements should be made to ensure authentication of the evidence provided.

Where it is not possible to use workplace evidence for assessment purposes then a simulated case study could be used. This should be provided by the centre. This case study may include role-play and well as explanations, descriptions and activities.

Candidates could submit information in electronic format where appropriate or a mixture of paper-based information with references to further information which is held electronically. In addition to hard copy, evidence could include a candidate interview for authenticity purposes

Higher National Unit specification: statement of standards (cont)

Unit title: Administrative Management: Personal Skills

Outcome 3

Contribute to meetings through researching and presenting information and advice.

Knowledge and/or Skills

- ◆ Research skills
- ◆ Summarising skills
- ◆ Presentation skills
- ◆ Discussion skills
- ◆ Meeting procedures

Evidence Requirements

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

- ◆ research and extract relevant information from at minimum of three different sources. At least one of these sources should include statistical data which requires interpretation and formatting.
- ◆ extract and summarise relevant information into a format which can be easily understood by the recipients and correctly reference the sources used.
- ◆ produce documents which accord with organisational standards required for meetings.
- ◆ accurately analyse the information for the purpose required.
- ◆ present the information and recommendations to a specified group following organisational meeting requirements and procedures.
- ◆ contribute to discussions and answer questions on the information researched.

Candidates will require to present researched information in a logical and methodical format and should prepare a presentation in a format which is appropriate to the size and type of group meeting specified.

Assessment Guidelines

The assessment for this Outcome could be based on real workplace evidence and could include evidence researched from the internet, from internal sources such as organisational records, from printed materials such as trade magazines and from face to face interviews with other members of staff. Conclusions drawn could be presented using presentation software or in booklet format with recommendations being clearly drawn from the evidence provided.

Candidates should be encouraged to present information using IT skills and presentation skills although this is not mandatory. Where workplace evidence is to be used, the purpose of the research and the basis of the evidence should be discussed with the candidate's line manager. The ultimate decision as to suitability of the work evidence will rest with the presenting centre and arrangements should be made to ensure authentication of the evidence provided.

Where it is not possible to use workplace evidence for assessment purposes then a simulated case study could be used. This should be provided by the centre. This case study could include role-play and activities.

Higher National Unit specification: statement of standards (cont)

Unit title: Administrative Management: Personal Skills

Candidates could submit information in electronic format where appropriate or a mixture of paper-based information with references to further information which is held electronically. In addition to hard copy, evidence could include a candidate interview for authenticity purposes

Outcome 4

Evaluate situations and use skills to motivate others

Knowledge and/or Skills

- ◆ Motivational methods
- ◆ Types of behaviour
- ◆ Assertiveness skills
- ◆ Management of conflict
- ◆ Customer care skills

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can produce a portfolio of evidence to demonstrate that they can analyse and evaluate three different situations which deal with both internal and external customers and use appropriate skills to achieve resolution. One of these situations should be a conflict situation. In the conflict situation, the candidate should:

- ◆ identify the focus of the conflict and the types of behaviour apparent in the situation
- ◆ suggest a minimum of two alternative ways to manage the conflict situation
- ◆ suggest an appropriate response to adopt to ensure that those involved remain motivated

In the second case, the candidate should analyse the situation and respond by suggesting two different approaches which could be adopted to maintain motivation levels and ensure that the organisation's goals are achieved. The candidate should recommend and justify the use of one of these preferred approaches.

In the third situation the candidates should demonstrate the successful use of assertive behaviour and customer care skills to achieve the organisation's desired result.

Assessment Guidelines

The assessment for this Outcome could be based on real workplace evidence and could take the form of a series of documents, records of meetings and witness testimony to show that potential conflict had been minimised. Candidates could provide a description of the focus of the conflict and notes on the behaviour of those involved which includes identification of the type of behaviour demonstrated. In the second situation, the background to the situation should be logged and the desired end result should be explained. The motivational methods used could be clearly outlined. In the third situation the candidate's assertive behaviour should be logged and may be evidenced through witness testimony story board and/or role play. For example this could be dealing with an aggressive client or member of staff or an aggressive supplier. The customer care skills used should be linked to the organisation's customer care policy.

Higher National Unit specification: statement of standards (cont)

Unit title: Administrative Management: Personal Skills

Where workplace evidence is the basis of the evidence should be discussed with the candidate's line manager. The ultimate decision as to suitability of the work evidence will rest with the presenting centre and arrangements should be made to ensure authentication of the evidence provided.

Where it is not possible to use workplace evidence for assessment purposes then simulated case study materials could be used. This material could take the form of three different case studies which may or may not be linked but should be role-play, activities and narrative provided by the candidate. These case studies could be contextually linked.

Candidates could submit information in electronic format where appropriate or a mixture of paper-based information with references to further information which is held electronically. In addition to hard copy, evidence could include a candidate interview for authenticity purposes. Additionally where role play is used, this should be recorded.

Outcome 5

Demonstrate flexibility and initiative in dealing with work and people

Knowledge and/or Skills

- ◆ Flexible working practices
- ◆ Problem solving techniques

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can produce a portfolio of evidence to demonstrate that they can work flexibly to:

- ◆ anticipate and identify potential issues and proactively work to avoid difficulties
- ◆ provide at least two alternative innovative solutions to a problem and identify and justify best fit

Candidates will require to present their evidence in a logical and methodical format. Additionally candidates should also provide evidence of at least three occasions where actions required were anticipated and carried out in advance of problems or conflict arising.

Assessment Guidelines

The assessment for this Outcome could be based on real workplace evidence and could take the form of a series of documents, records of meetings and witness testimony to show that potential problems had been minimised or avoided. Additionally candidates could provide additional evidence of flexibility in working practices such as providing cover for absent colleagues, changing priorities to cope with unforeseen circumstances, dealing with data management issues.

Where workplace evidence is the basis of the evidence should be discussed with the candidate's line manager. The ultimate decision as to suitability of the work evidence will rest with the presenting centre and arrangements should be made to ensure authentication of the evidence provided.

Where it is not possible to use workplace evidence for assessment purposes then simulated case study materials could be used. This could be provided by the centre and could include role-play and activities.

Higher National Unit specification: statement of standards (cont)

Unit title: Administrative Management: Personal Skills

Candidates could submit information in electronic format where appropriate or a mixture of paper-based information with references to further information which is held electronically. In addition to hard copy, evidence could include a candidate interview for authenticity purposes

Administrative Information

Unit code: F3FL 35

Unit title: Administrative Management: Personal Skills

Superclass category: AB

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Version	Description of change	Date

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Higher National Unit specification: support notes

Unit title: Administrative Management: Personal Skills

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 a mandatory Unit in the Professional Development Award in Administrative Management. It may also be undertaken as a stand-alone Unit which introduces candidates to the main personal skills required of a person in a senior administrative role. 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 in this kind of post, after a career break

Outcome 1 candidates will need to know about:

- ◆ Diaries both electronic and paper-based — entries, alterations, multiple entries, co-ordination
- ◆ Task and time management, work schedules, priorities and the importance of deadlines, timelines and informing others of potential delays
- ◆ Follow up systems such as reminders, tickler systems, to do lists

Candidates should be encouraged to develop their own time management system to help with the organisation of materials for this Unit. They should develop their own timelines within given constraints and should be held to account if these are broken.

Outcome 2 candidates will need to know how to:

- ◆ negotiate with others
- ◆ identify different project stages
- ◆ plan and co-ordinate tasks and time to meet required milestones
- ◆ track activities and progress using techniques such as identifying key timelines, dependencies, milestones
- ◆ update plans and identify milestone which may not be achieved
- ◆ record and share lessons learned

Candidates could use project planning software or spreadsheets to record their planning and scoping.

Higher National Unit specification: support notes (cont)

Unit title: Administrative Management: Personal Skills

Outcome 3 candidates will need to know about:

- ◆ Researching information and extracting relevant parts of it
- ◆ Summarising information, including statistical information, into different kinds of format eg charts, bullet points, diagrams
- ◆ Analysing the information to draw accurate conclusions and recommendations
- ◆ Presentation skills using presentation software and documents
- ◆ How to discuss relevant points and answer questions on the information supplied
- ◆ Meeting procedures — format of documents used to present information eg reports, papers, minutes

Candidates could include electronic references to materials used and may keep a separate file of source materials from which recommendations and conclusions are drawn.

Outcome 4 candidates will need to know about:

- ◆ Different types of behaviour — passive, assertive, aggressive and bullying
- ◆ How to behave assertively — be open, calm, honest, firm, professional and how to maintain assertiveness in the face of anger and aggression
- ◆ Manage complaints by apologising, accepting and acting
- ◆ How to influence others
- ◆ Make requests clearly and directly
- ◆ Deal with potential sources of conflict in an assertive way
- ◆ Manage conflict and retain motivation
- ◆ How to motivate others — positive and negative reinforcement, rewards both financial and non-financial
- ◆ Customer care skills — benefits of customer care, complaints procedures, customer service levels, measuring customer care, internal and external customers

Outcome 5 candidates will need to know about:

- ◆ How to solve problems using process maps, SWOT analysis, brainstorming
- ◆ Flexible approaches to working — in terms of time, tasks undertaken, ability to give and take criticism, working with others — working in different ways, working in different teams, sharing files and spreading workload, anticipating difficulties of others

Guidance on the delivery and assessment of this Unit

Delivery of this Unit could be:

- ◆ through short input session using on-line or open learning sessions or attendance at lectures followed by portfolio compilation sessions either held individually or for a group. This would be best suited to those currently in employment.
- ◆ through classroom sessions where each Outcome is taught, discussed and tested using case study methodology. This method will rely on role plays as well as case studies. This method would be best suited to those who are undertaking the Unit prior to employment or returning to employment.

Higher National Unit specification: support notes (cont)

Unit title: Administrative Management: Personal Skills

Overall assessment of the Unit is through portfolio compilation and evidence for the portfolio should be gathered from as many sources as possible for example if the candidate is on work placement, or does voluntary work, or is in employment. Workplace evidence can be supplemented through case study and role play materials.

Outcome 1

There could be input sessions on time and task management, electronic diaries and follow-up systems. Candidates could be given an in-tray exercise which is spread over several weeks and requires them to prioritise tasks and to ensure that incomplete activities are followed up and kept on track. Candidates will have to justify and explain why they have given priority to certain tasks. This could be done verbally or in written format eg by e-mail.

Outcome 2

Candidates could use evidence from their workplace to show that they have planned, scoped and tracked complex administrative tasks or alternatively they could be given an activity or case study along with a role play to complete. Where an actual event is planned by a group, tutors should ensure that each candidate is able to undertake the competencies required in this Outcome. This could be linked with Outcome 5 of Managing Administrative Services.

Outcome 3

Candidates could use materials from their workplace to evidence this Outcome. This should be agreed with their line manager and Tutor. Where this is not possible candidates should be given a case study to research and present to a meeting and should role play discussions and participate in a question and answer session. Ideally the Tutor should provide a number of different topics for research so that all candidates widen their experience for example, advising on new office furniture for a given area, advising on where to keep Staff Club Funds, advising on venues for a staff conference, advising on printing a staff handbook. Candidates as a group should be walked through a sample topic researching, summarising, drawing conclusions and making recommendations and presenting findings, as a group prior to assessment.

Outcome 4

Much of this Outcome could be taught through role play and the use of assertiveness training techniques, and customer care skills. Candidates should be encouraged to think about what causes conflict at work and how it can best be tackled. Motivation should be explained with reference to motivation theorists as well as what happens in the workplace. Workplace evidence can be used but is likely to be supplemented with role play activities in this Outcome.

Outcome 5

Candidates will require to demonstrate their ability to anticipate potential problems and to use their initiative to ensure issues do not arise. This could be illustrated through workplace evidence or could be an activity-based case study provided by the centre.

Higher National Unit specification: support notes (cont)

Unit title: Administrative Management: Personal Skills

Opportunities for developing Core Skills

The Core Skill of *Problem Solving* is developed throughout this Unit. Candidates will either have to provide evidence of problem solving in their workplace or respond to provided case study materials which require them to solve problems. This is apparent in Outcome 1, 2, 4 and 5.

Throughout the Unit candidates will be expected to use *Information Technology*. They will require to word process all documents, to research using the internet (Outcome 3), to use diaries which are likely to be electronic diaries (Outcome 1), use e-mail to communicate to others, use presentation software to present their findings (Outcome 3). Candidates will also have to work with communal files and folders or those which have been set up and used by others. In all software applications senior administrative staff are expected to be proficient in the use of information technology and to manage files and folders in a way which meets the needs of their organisation. The presentation of the candidate's portfolio of evidence could be electronic or partly electronic and throughout the candidate will need to show that they have gathered information in a logical and accessible way.

Communications and *Working with Others* are integral parts of this Unit with the candidate having to show that they can communicate locate documents, extract relevant information, summarise that information and present it in a format suitable to the receiving audience — this is likely to take the form of a presentation using presentation software although it does not have to take this form. Candidates will also require to negotiate with others, to participate in discussions and to help manage conflict.

Open learning

Parts of this Unit could be delivered through Open Learning. For example the input required could be available on-line or in Open Learning packs although assessment is likely to require role-play in some Outcomes. This would require the candidate to come together with others. Where work-place evidence is being used as the basis of the candidate portfolio, every effort should be made to ensure confidentiality of the materials being submitted and their submission should be discussed with the candidate's line manager and agreed by the presenting centre. Witness testimony could help ensure authenticity of evidence but centres are advised to ensure that some observation and focussed questioning is also used to ensure that the work submitted is the candidate's own.

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: Administrative Management: Personal Skills

This Unit has five Outcomes all of which will help you to develop the personal skills required to carry out a senior administrative role.

In Outcome 1 you will learn how to use time management techniques so that you can maximise your effectiveness. This means you will learn how to prioritise different kinds of task, ensure you are fitting in with other people and how to re-negotiate timelines.

Outcome 2 is about planning and scoping tasks. Here you will learn how to track progress and how to work out milestones, how to co-ordinate your work with others and how to make sure you learn from any mistakes you make.

Outcome 3 is all about researching and extracting information and presenting it in the form of advice to meetings. This means you will not only have to find and read documents and electronic information but you will have to summarise relevant information and present it in a format which other people can readily understand.

In Outcome 4 you will learn about different types of behaviour including assertive and bullying behaviour and how to motivate people. You will learn how to deal with awkward situations, how to find ways of managing the situation and how to ensure that those involved retain their motivation. You will also learn how to deal with customers both internal and external.

Outcome 5 is about your ability to work flexibly, and demonstrate your initiative in the workplace. This is an important aspect of working at this level and you will be developing your ability to anticipate your organisation's needs.

You will be assessed in this Unit through the compilation of a portfolio of evidence. This evidence could be compiled from your workplace if you are in employment or it could be compiled from case study materials supplied to you by your presenting centre or it could be a mixture of both. You will be expected to participate in role plays and to produce documentary evidence which could be hard copy or electronic.

In undertaking this Unit you will develop the Core Skills of *Problem Solving, Information Technology, Communications* and *Working with Others* at SCQF level 6, although there is no automatic certification of these skills.