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## **Self Administration Standards Development**

**Final Report**

**May 2005**

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## 1. Introduction

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The CfA is the national standard setting body for business & administration skills in the UK. It is responsible for developing standards to meet the needs of three separate markets:

- 3 million generic business administrators across all sectors in the UK, e.g. secretaries, clerks, administrators and business support operators.
- 1.7 million specialist business administrators in sectors such as health, law and education
- 18 million people who need some business and administration skills in order to carry out their own jobs competently, e.g. professionals, managers, support workers and principals in small businesses.

The purpose of this project is to develop 'Self Administration' business & administration units to complete the revised suite of Business and Administration NOS recently approved by UKCG.

The aim is to identify business and administration skills needed by managers, small business, professional and other business related occupations in large, medium, small and micro sector organisations.

There are more than 18 million workers in the United Kingdom in professional, managerial, small business and other business related occupations (excluding business administrators) who need business and administration skills to carry out their own job competently. The new generic standards are designed for administrators and are too detailed and specific to provide key performance indicators for this extensive workforce.

As a result, the CfA will draft a suite of Self Administration Business and Administration Standards to target this workforce, setting the benchmark for these employees across all sectors and increasing the skill-set for all employers.

## 2. Methodology

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### Desk Research

The following CfA work was reviewed:

**Revised Business and Administration Occupational Map, March 2005** - revising the occupational map for business & administration.

**Business Administration Occupational Map, December 2001** - examining the occupations and job roles within business & administration.

**Small business feasibility study** – identifying the need for standards to be described differently, specialist pathways to be available for administrators working in small businesses, more flexible qualification structures for administrators in small businesses, more accessible and cost-effective training, development opportunities and qualifications for administrators in small businesses, changes in competitive administrative practice at work and functional gaps in the UK standards.

**Consultative workforce development plan** – focusing on the nature of administration skills and responsibilities, recruitment and retention of administrators, education and training supply, as well as quality, image, and investment to reduce turnover in staff.

**Administration skills survey** – identifying business, information and computer technology, finance and management skills as the most important development needs for administrators in 2003.

**Effectiveness of standards, NVQs/SVQs and assessment strategy** – focussing on the way employers use performance indicators, how performance is measured, NVQs/SVQs and assessment strategy.

**Business & administration qualification framework** – identifying the range of administration and work skills needed by employers for vocationally-related qualifications, significant changes in practice at work and functional gaps in the administration standards.

### Consultation

The CfA consulted with partners using an e-consultation format. Emails were sent to CfA partners requesting feedback on the new Business and Administration standards during February and March 2005. Participants were asked to complete a questionnaire on the new Business and Administration standards to identify potential gaps for administrators in their sector. The questionnaire was followed up by telephone calls to encourage sectors to complete the form.

CfA circulated a questionnaire to all SSCs, in order to establish the activities that need to be included within 'Self Administration' units. Feedback from this questionnaire resulted in three units drafted under the following headings:

- Prioritising and Planning
- Business Support
- Managing Information

There was also a requirement for IT skills. CfA took the view that the export units, developed by E-skills UK should be used to cover these requirements.

To obtain further feedback on the Self Administration standards and for refinement purposes, the CfA made these Self Administration standards available to stakeholders and employers for comment.

The CfA also wanted to assess the IT requirements for the draft Self Administration standards, as well as ask for comments on the four approved IT export units, developed by E-Skills UK. These included:

- Use IT to exchange information
- The general uses of IT
- Use IT systems
- Use IT software.

### Drafting the Standards

To draft the Self Administration units, the CfA designed a number of questionnaires drawing on the work that had been done in the revision of the generic Business and Administration Standards. These questionnaires were then sent out to stakeholders and employers for comment, in order to refine the development of these standards.

The initial three draft 'Self Administration' units and the five E-skills UK export units were taken to the Steering Group. Revised drafts of the standards were produced as a result of feedback received at this meeting, and from the Awarding Body Forum.

The CfA then consulted with partners as follows:

- Through an e-consultation format. Emails were sent to CfA partners requesting feedback on the 'Self Administration' units, through completion of a questionnaire.
- Through telephone interviews.
- Through a development workshop with employers, held on 1 September 2005.

### Piloting of Draft Standards

The piloting centres that were used to pilot the draft Self Administration standards are detailed below:

Organisation	Sector
ITC Ltd	Administration
South Cheshire College	Further education
Southampton City Training	Training provider
GEN II Engineering and Technology Training	Engineering/ICT/Nuclear
Gateshead College	Further education
First College	Training provider
Peterborough Regional College	Further education
Southampton City Training	Training provider
Axia Solutions	Administration
ATG	Training Provider
SSCL& DC	Local government/H&SC
Thames Valley University	Education
Babington Business	Business Training
Cornwall College, St Austell	Public
Warrington Development Centre	Irwell Road

Perth and Kinross Council	Corporate Services (HR)
Self-employed	Entrepreneur
Education and Training Skills	Training (AD, CS, IT)
Skills for Health	Health
AMSPAR	Health

### Steering Group

The CfA set up and operated a Steering Group. Membership included representatives from sector skills councils and all provided invaluable contributions to the development of the units.

Steering groups were held on:

- 1 August 2005
- 6 December 2005
- 28 February 2006

Outcomes of the piloting process were discussed within the Steering Group meeting and the units were revised according to the feedback and comments made at the meeting.

### Awarding Body Forum

The CfA operates a professional and Awarding Body Forum. Throughout the year, the forum has been notified of the developments related to the Specialist, governance and Self Administration units. Members have provided useful feedback and the CfA have used the forum as a sounding board for project developments, as well as for the dissemination of information for the sector.

Awarding Body Forums were held on:

- 29 June 2005
- 28 September 2005
- 16 March 2006.

### 3. Outcomes

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#### **Identification of business and administration skills needed by managers, small business, professional and other business related occupations in large, medium, small and micro sector organisations.**

The Business and Administration Occupational Map, Updated March 2005 outlines the following skills gaps within business and administration job roles:

*'Administration has the third highest level of skills gaps, primarily in relation to Information Technology, which was identified in the 2002 Occupational Map as a skills need.'* The 2005 Business and Administration NOS have addressed this gap by including the following Information Technology competencies within the standards:

- Use IT systems
- Use IT to exchange information
- Use word processing software
- Use spreadsheets software
- Use database software
- Use website software
- Use artwork and imaging software
- Use presentation software
- Use specialist or bespoke software

These units have been imported from e-skills UK, IT User NOS and bring the new NOS in line with current industry requirements.

*'Perceived skills shortages within administrative and secretarial occupations amongst employers were "soft" skills, particularly the right "attitude". Employers defined this in several ways but specifically employees without the right attitude displayed:*

- Lack of attention to detail
- Lack of enthusiasm and willingness to work
- Poor telephone and "people skills"
- A lack of "common sense"

This research undertaken by Gordon Yates supports the findings of previous CfA research undertaken in the run up to the review of the 2005 National Occupational Standards. These findings have already been addressed by the development of new core units of the new Business and Administration NOS. The core units have been developed specifically to address the following work competences and therefore develop skills such as those identified by employers above.

#### **Carry out your responsibilities at work**

- Information communication
- Work planning and accountability
- Improving your own performance
- Behaving in a way which supports effective working

#### **Work within your business environment**

- Working to achieve your organisation's purpose and values
- Apply your employment rights and responsibilities
- Supporting diversity
- Maintaining security and confidentiality
- Assess and manage risk

*'There is an emerging trend for administrative staff to support more than one manager, for example Gordon Yates identified that 33% of staff now work for 5 or more people. This is likely to have an impact on both the type and level of skills required by such staff, especially in relation to negotiating and inter-personal skills, communication, problem solving and organisational skills such as time management. These skills have been identified as skills shortages in the wider labour market.'*

The 2005 Business and Administration NOS include a skills list that identifies the skills, which may be developed or used to demonstrate competency. The skills identified above are regularly identified throughout the new standards. The statement above indicates that these skills are important for business administrators working for 5 or more people, or business administrators working in medium and large businesses.

The initial soundings for the first drafts that the CfA had produced were good. The members recommended that the five original IT units that the CfA proposed for use in consultation with employers would not be necessary.

The main outcomes of the discussions at the Steering Group on 1 September 2005 were that:

- The activities covered in the three draft units should be brought together into one unit
- Only two of the originally selected e-skills export units that had been envisaged for consultation should be used, namely, 'Use IT to exchange information' and 'General uses of IT', both at level 3.
- A revised draft 'Self Administration' unit was produced, and this version has been used for the e-mail, telephone and employer workshop consultations.

Only 45% of respondents thought that Self Administration units should cover 'supporting meetings', while only 55% thought that 'managing your own diary and travel' should be covered in these units.

At the steering group, it was identified that this work might be very useful within the health and social care sectors. As a result, the CfA recruited members of these sectors for participation in a workshop and the outcomes proved very positive:

- IT skills are essential, including the use of It equipment, mobile technology
- e-Skills units are needed for inclusion in the Self Administration Business and Administration standards.
- The many uses for the Self Administration Business and Administration standards include for appraisal purposes, to form part of an induction plan for an organisation, for charting career development, as well as to assist with internal training within an organisation.

**The results from the questionnaire were again extremely positive, with an overwhelming 97% of all respondents signalling that nothing should be added to improve these units.**

Interestingly, the most important Self Administration skills appear to be:

- Making and receiving telephone calls
- Operating office equipment
- Dealing with post and email
- Handling files
- Sending and receiving emails
- Researching information
- Accessing data

Again, the importance of IT in the workplace is supported by this survey.

Regarding the Self Administration units, all the indications suggest that employees are going to have to improve their business and administration skills. With an overwhelming majority of employers agreeing that their employees need to increase their business and administration skills, the development of this work should go along way to establishing a benchmark for improvement of these skills in all sectors. The implications of this work are significant and further work may need to be undertaken at a later date.

As a result of a high level of communication required within the contexts of these job roles and because these workers are not full-time administrators, the administration skills contained in the Self Administration units will support this need for effective communication within the context of the core function of their roles. As a result, the CfA Self Administration Business and Administration Standards need to encompass all the administrative skills, which enable these workers to communicate their roles and responsibilities effectively.

The administrative skills for inclusion in the Self Administration standards will support efficient research techniques and initially, the planning and then organisation of changing workloads. The administration skills, used in conjunction with technology, will also aid workers in their use of number within their daily tasks. Decision-making, problem-solving, being able to listen and work within a team, were all highlighted as key skills which feed into all aspects of the work of such employees and which are supported by the use of the administration skills mentioned in the draft Self Administration unit.

The unit 'functions of business support' is too large and will need to be separated into distinct units.

The consultation has resulted in numerous queries about the application of qualifications for this group of workers.

Steering Group members were presented with the pilot feedback. The main outcomes of the discussions at the Steering Group on 6 December 2005 were that:

- The purpose, context and intended audience of the standards needs to be clarified for potential users.
- The group would support the retention of the detailed information contained in the 'functions of business support' and this should not be lost when the single draft standard is separated into distinct units.
- The group supported a new title for the standards, with the explanation that the word 'Self Administration' is not an easily understood term.

The draft 'Self Administration' standards are currently being revised and separated into areas covering the following areas:

#### **Communicate effectively**

This unit contains performance indicators, which cover communicating effectively with contacts, including team members, colleagues, customers, clients, stakeholders and visitors, which are both internal and external to your organisation, within the context of your job role.

#### **Manage your workload**

This unit contains performance indicators, which cover all aspects of prioritising you workload, including planning, organising and reviewing your work schedule, within the context of your job role.

**Manage information**

This unit contains performance indicators which cover all aspects of the use, research and storage of the information which you need; as well as how to present such information, within the context of your job role.

**Manage your own diary and travel**

This unit contains performance indicators, which cover aspects of managing your own diary and travel according to the time you have available and which suits the purpose of your job function, within the context of your organisation.

**Deal with contacts**

This unit contains performance indicators, which cover making and receiving telephone calls internally and externally, and dealing face-to-face with visitors and callers, and your own post, in the context of your job role.

**Plan and organise meetings**

This unit contains performance indicators, which cover making arrangements for meeting, including the planning and organisation of meetings, within the context of your job role.

**Use IT to support your role**

This IT unit contains performance indicators, which support all the administrative functions detailed in the Self Administration Business and Administration Standards and which are used in the context of your job role.

**Use office equipment**

This IT unit contains performance indicators, which cover the use of office equipment, which supports you in achieving your aims, within the context of your job role.

The units cover the same content and detail of information that was covered in the previous version 'functions of business support'. The CfA has grouped the content of the unit into the areas of responsibility, which are based on functional rather than corporate outcomes, for which such a worker would need to be competent to perform well within the job role.

The group provided positive feedback and only minor changes were recommended to the final drafts. The suite of standards consists of seven Business and Administration units and one E-Skill UK contextualised unit.

E-Skills UK was very supportive of the project. It should be noted that as a result of this being a contextualised unit, based on the E-Skills uk Areas of Competence export units: *General Uses of IT* and *Use IT to exchange information*, this unit should not be used within an NVQ/SVQ and E-Skills uk must be contacted for further discussions should the demand arise for the use of the unit within an NVQ/SVQ.

The suite of Self Administration Standards is listed below:

- SAS 1 Communicate effectively
- SAS 2 Deal with contacts
- SAS 3 Manage own diary and travel arrangements
- SAS 4 Manage and store information
- SAS 5 Plan and manage own work load
- SAS 6 Plan and organise meetings
- SAS 7 Use office equipment
- SAS 8 Use IT to support own role

The CfA also drafted a supplementary guidance document to accompany the suite. This details the target audience, the purpose of the standards, the context in which they can be used and the benefits they bring to both employees and employers.

This will act as a guidance document to employers. It encourages the use of standards in recruitment and selection, induction training, measuring performance, continuing professional development and appraisals.

The SAS will provide support to those non-administrators that need to increase their administration skills. In this way, the SAS will strengthen employers' internal administration processes and play a role in addressing the organisation's administration strategy. Employers recognise that an administration strategy is essential to their organisational structure but many have yet to put such an internal strategy in place. Annex I details the possible uses of the standards in such a strategy.

Members of the Awarding body forum were notified of the submission of the standards at the end of March. The group provided valuable comments as to the renaming of the suite of standards and were receptive to the impending standards. The group showed much interest in the submission of the Self Administration Standards and was interested as to potential uses of the suite.

## 4. Evaluation

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The following is an evaluation of the CfA piloting exercise, conducted during October and November of 2005, to test the content of the draft Self Administration Business and Administration Standards.

### **The intention**

The aim of this CfA project was to set a benchmark for all those workers across the United Kingdom that are non-administrators. Currently, there are more than 10 million workers in professional, managerial, small business and other business related occupations that need Business and Administration skills to carry out their own job role competently. This represents a large number of the working population across all occupational sectors, which are not business administrators, yet they have to develop the necessary skills, which enable them to be competent in their jobs.

Essentially, this work will affect all sectors and it is vitally important that the CfA is able to produce standards which would meet the requirements of the supportive administrative function within all spheres of industry, the needs of all employers and which would be able to ensure that these workers are as efficient in their delivery of a quality product as possible.

On this premise, the Self Administration Business and Administration standards were developed for the following purposes:

- To set a benchmark, across all sectors, for the Business and Administration skills necessary to enable these workers to function in the daily tasks.
- To develop a suite of standards that will exist on their own.
- To set the benchmark against which companies can measure their own training and development manuals and programmes, as well as to assess the standard of these training and development resources.
- To provide a structure against which to chart the progression of employees' in their development of their individual skills.
- The structures against which employee appraisals can be mapped and job descriptions derived.
- As a recruitment tool and for measuring the competencies of future employees, by providing the basic Business and Administration skills which all employers should expect their employees to master.
- To improve administration skills nationwide, that would in turn have the knock-on effect on the productivity of the United Kingdom's economy.

### **The context and nature of role, which these workers occupy**

The types of roles, which these workers occupy, necessitate a high level of communication skills and involve the strong development of inter-personal skills. The results of the piloting exercise support this notion and emphasises that at this level of job role, there is a need to have developed strong Business and Administration skills, which will support the communicative function.

Whether communicating externally or internally; face-to-face, on the telephone, by post or via email; if these workers do not have the ability to deal with these contacts; manage this and other information; manage their own workload in conjunction with this new information; manage their own diary and travel arrangements; plan and organise their own meetings, use IT to support all of

these functions as well the relevant office equipment to ensure the delivery of their products, then the channels of communications are closed and the worker is unable to effectively fill his or her role.

Since these Self Administration Business and Administration standards cross over so many sectoral boundaries, you might even refer to them as the skills that offer the solution to better communications. Without them, organisations are faced with the situation that is reported in the media countless times, a problematic situation that the United Kingdom faces, namely, an unskilled workforce. With the Self Administration standards, the CfA means to offer the first step towards a solution to target this undeveloped workforce and bridge these skills gaps.

## Evaluation

With the intention of the development of the Self Administration standards revisited and the nature of the roles which we are targeting clearly defined, a number of important issues have to come to light over the progression of this project which need to be assessed against these factors. These include:

- Employers and stakeholders have been very enthusiastic about this work and are interested to receive more information about this CfA initiative. This supports our research and independent findings stating that there are skills gaps, which need to be filled with the introduction of these Self Administration standards.
- Employers ratified the content of the standards when they were asked for their comments during the consultation of Milestone two. This is a further indication that CfA had correctly identified the right Business and Administration skills that need to be used, firstly to support and ultimately, produce the work that these employees do everyday.
- The pilot feedback identified that the presentation of the standard might not be as sound as the content. This does not refer to the format, but instead to the amount of information contained in the draft unit 'functions of business support'.
  - Respondents did identify the clusters of performance indicators, which can form separate standards, in order to make the suite of standards easier to comprehend.
  - The division of this one standard into separate standards could also aid understanding for the purpose of the work, namely to develop standards for those administrative functions that non-administrators need to perform.
  - Through this division, the CfA would achieve a clearer distinction of the over-arching skills that are needed.
  - These standards cannot be as specific as those contained in the Business and Administrative standards that were reviewed during 2004/05 because these Self Administration standards are supportive standards for the wider skills that we employ in our every day jobs.
- With this in mind then, the CfA proposes the separation of the one Business and Administration standard into eight standards covering the following areas:
  - Communicate effectively (A level 3 standard)
  - Manage your workload (A level 3 standard)
  - Manage information (A level 3 standard)
  - Manage your own diary and travel (A level 3 standard)
  - Deal with contacts (A level 3 standard)
  - Plan and organise meetings (A level 3 standard)
  - Use IT to support your role (A level 2 standard)
  - Use office equipment (A level 3 standard)
- Clarification needs to be made within all the standards that all these functions are performed within the context of your own role and working environment.

All functions will then be performed within the workers' relevant sector. By placing these standards in this context and against the backdrop of a highly communicative environment, where team working, inter-personal skills, problem-solving, writing, organising, planning listening and researching are all important and relevant skills to the role, the CfA has defined the Business and Administration standards to support these skills. Evidence requirements will need to be stipulated and again will be dependant on the context in which worker will perform their role.

- Comments were raised over whether the content of the work was in fact basic, however, it needs to be stated that this content was approved by employers by 97% and the standards do reflect the essential skills in which we have to be competent if we are non-administrators. These skills are applied at all levels and very much are dependant on the context of the job role.
- Although there were questions raised about the relation of the work to qualifications, when this was not the intension, these questions have brought to the attention of the CfA that there is further evidence to support the contextualisation of the work and an introductory/profile page to clarify who this work is aimed at and whom will find it useful.
- The inclusion of examples of job roles, such as professional and managerial roles, will also go a long way to help employers identify with the target audience of these standards.
- Personal and professional development was a possible function to be included. However, this was a very hard performance indicator to monitor and it did not stimulate much discussion.

The CfA will focus on the following tasks in the coming months to further develop this work:

- The CfA must draft an introduction to the suite of Self Administration Business and Administration standards. This must communicate:
  - The intention of the work.
  - The context of the role to which this work applies.
  - The workers at which it is aimed.
  - Examples of the kinds of job roles at which it is aimed.
  - The workers that might find it useful, for example, Human and Resources staff.
  - The differences between the CfA Business and Administration standards and the Self Administration Business and Administration standards.
- Explore different ways of dissemination of this work, such as the viability of the introduction of a training/benchmarking manual or tool, or an on-line training toolkit for all sectors.
- Obtain the sign-off of these standards through a final steering group meeting in the first quarter of 2006.

The Self Administration standards have been developed to set a benchmark for all non-administrators that need to be competent in a number of administrative processes in order to support their job function. These standards can be incorporated into inductions, job descriptions, training packages, recruitment procedures and to chart the career progression for employees.

The CfA will promote the SAS for these purposes to increase the skills of non-administrative staff, to encourage learning and development of this workforce in a functional and flexible way.