



**Recommendations to
improve the work
experience**



RECOMMENDATIONS TO IMPROVE THE WORK EXPERIENCE

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1. INTRODUCTION

In the spirit of continuous improvement and in reaction to evaluations carried out on Young People in Cohort 1 & 2 of the Young Apprenticeship in Business & Administration programme, the following report details some recommendations made to Partnerships in relation to improving the quality of the extended work placement element of the programme.

2. METHODOLOGY

2.1 Desk Research. York Consulting evaluation of young people from Cohort 1, commissioned by LSC. NFER key findings from an evaluation in to Young people's experiences commissioned by the LSC.

2.2 Key findings from a piece of research conducted by the CfA in to the preferred learning environments with employers. A consultation with Lead partners, Young Apprentices and employers was carried out between November 2005 and January 2006. A copy of the full research report can be found on www.cfa.uk.com/ya.

2.3 Consultation with Margaret Barkway, Work-based learning consultant (WBL) Consultant. Through this consultation we discussed how the need for the recommendations to be flexible, differentiated according to the learner but concluded it was important for an element of WBL to be a level 2 project in line with the level of the rest of the YA curriculum. Key findings from this consultation can be found in section 3.3.

2.4 Workshops with partnerships at regional events. Partnerships were asked to write mock projects for Young Apprentices using selected Level 2 units. Activity brief can be found in Appendix A and further detail on each selected unit can be found in Appendix C. Minutes from these events can be found in Appendix B.

3. KEY FINDINGS

3.1 DESK RESEARCH KEY FINDINGS

York consulting and the National Foundation for Educational Research conducted some evaluative research in to the experience of Young People on the Young Apprenticeship in Business & Administration in Cohort 1. The following key findings have created the need for the CfA to make recommendations for improving the work placement:

- Most likely, of all sectors, to want to do something different and less likely to be interested in the careers in the sector.
- Majority of students were not satisfied with their experiences of the programme
- Less likely to find the programme interesting
- More likely to comment that their placements had become somewhat repetitive and uninspiring

The extended work placement element to the programme is one of the unique factors that make this programme appealing and interesting to young people. It is this part of the programme that can largely affect the experience of young people on the programme in a positive or negative way. This is why the CfA have identified this area as the focal point for our recommendations.

3.2 KEY FINDINGS FROM CfA RESEARCH IN TO PREFERRED WORK-BASED LEARNING ENVIRONMENTS.

Research was conducted into good practice for creating an enriched and coherent work-based learning environment for Young Apprentices. The research was split in to 3 sections, induction and selection, designing the work-based learning programme and supervision, all equally impacting the effectiveness of the work-based learning environment from different angles. The following are key findings from each section and a full report can be found at www.cfa.uk.com/ya:

Induction and Selection:

Quantitative:

- 36% of employers felt that there Young Apprentices were under prepared upon arrival in the work placement.
- 27% of employers felt that Young Apprentices were least prepared in employee rights and responsibilities. 27% of employees though that Young Apprentices lacked knowledge of the organisation in which they were placed.
- 88% of lead partners felt that the idea of protected placements was either very or fairly beneficial. (NB. A protected placement is time spent in a fully functioning administration department of the provider. It is important that the placement is supported by non training staff while still having access to full support from familiar training staff in a familiar environment.)
- 100% of lead partners felt that it was important for employers to be involved in the selection of Young Apprentices for placement.

- 45% of employers were not involved in the selection of their Young Apprentices for placement. 83% of those who were not involved in the selection stated that they would prefer to be in the future.

Qualitative:

Employers made the following comments in relation to the induction and selection element of the programme:

"Tasks and activities that encourage initiative in the young people should be included within the induction programme, so that they are more forthcoming in the workplace."

"Make sure they are fully aware of their job role on arrival, what types of activities and tasks they can be given."

"Maybe they should go to see a motivational speaker prior to placements or have a business mentor who has prepared"

"By selecting the young person for placement in my organisation I felt that my relationship with them was stronger from the outset. Due to this the placement was easier to manage and probably a more valuable experience for the young person."

"I felt a part of the process and therefore more responsible for supporting my decision."

Lead partners made the following comments in relation to the induction and selection programme:

"Use results of initial assessments used to determine a Young Apprentice's preferred industry for placement. Also use these results to determine the department and types of activities suitable for a particular YA."

"Have much dialogue with employers prior to placements. Discuss the requirements of the chosen NVQ, pre-determined project or any other qualifications structure and how they can be met in the context of the particular organisation."

"Produce a clear timetable of activity for the employer to follow during the placement."

Designing the work-based learning programme:

Quantitative:

- 88% of lead partners felt that it was either very or fairly important for the employer to be involved with designing the work-based learning programme.
- 45% of employers were not involved in the design of the work-based learning programme. 57% of those who were not involved stated that they would prefer to be in the future.
- 91% of lead partners stated that task-orientated activity was more beneficial than work-based projects.

- 77% of Young Apprentices that took part in a piloting activity preferred work-based projects to simple tasks. See Appendix C.
- 35% of employers felt that project-based activities which have an impact on the business offer the most valuable experience of their particular organisation and the roles available in the Business & Administration sector.

Qualitative:

Employers made the following comments in relation to the design of the work-based learning programme:

"I was able to determine tasks available for the Young Apprentice that was relevant to the activities going on in my department at that particular time."

"I was able to identify tasks and activities that matched the requirements of the relevant qualifications the Young Apprentices was studying, as well as allowing the young person to make a valuable contribution to our organisation."

"Work-based projects enable the young person to practice skills that are useful in any context as well as specific task-related skills."

Lead partners made the following comments in relation to the types of activities and tasks given to Young Apprentices in the workplace:

"I actually think it should be a mixture of both types of activities."

"Small manageable tasks that they can complete and makes them feel they have achieved something."

Young Apprentices made the following comments when asked the types of activities they preferred as a result of taking part in the piloting activity:

"I prefer the projects as they are more challenging and meant I had to do my own research."

"I preferred the project as it required my opinion and I was more motivated to complete it and get it right."

"I preferred it because it meant that I got to speak with different departments in the organisation and learn different perspectives."

"I learnt about the different services my company provided."

Supervision and Monitoring:

Quantitative:

82% of employers felt that their Young Apprentices did not need constant supervision throughout their placement.

34% of lead partners stated that they visit their Young Apprentice fortnightly whilst they were spending one day a week in placement. Those who's Young Apprentices were on block placements encouraged visits one day a week.

73% of employers asked that they are continually updated about the academic progress of the Young Apprentice in school, particularly the work-related aspects of the Young Apprenticeship programme.

Qualitative:

Employers made the following comments in relation to the supervision of their Young Apprentice:

"I would have preferred a full rota of activities and some guidance on what is required of me and the Young Apprentice. This would have made it a far more beneficial experience for both of us."

"I did not feel clear about my role as supervisor throughout the programme and would have liked a guidance pack. Also maybe an evaluation form for the young person to complete, evaluating my performance as a supervisor."

3.3 CONSULTATION WITH WBL CONSULTANT:

Biog: Margaret Barkway is an experienced training and development consultant who specialises in sharing good practice in assessment and verification. She undertakes external verification work for an awarding body. Margaret also undertakes inspections as an Associate Inspector with the Adult Learning Inspectorate for Business & Administration, Customer Service, Retailing and Warehousing and Distribution for work-based learning across a variety of funded programmes.

Having worked with employers to develop effective strategies that enable them to evaluate their in-house training and development programmes, mapping them to occupational standards appropriate for their business.

Margaret has worked with the CfA since 2001. She has hosted awareness events for new occupational standards implementation, facilitated workshops to introduce Technical Certificates and worked with CfA to help providers fully understand and embrace how to integrate the occupational standards to streamline their use in every day work activities.

The purpose of this consultation was to discuss how to improve aspects of the work experience through the Young Apprenticeship in Business & Administration.

Key Findings from this consultation are as follows:

- There is no reason that the work placements should not have an element of Level 2 activity integrated within it to match the rest of the YA curriculum.
- Skills required from a Young Apprentice in work placements were identified. See Appendix A
- From the skills identified, Level 2 units from the Business & Administration 2005 standards were identified appropriate to the 14-16 age group. See Appendix A.
- Work-based projects gave autonomy to learners and aided motivation.
- Gave the work-based learning programme context and allowed for a wider understanding of the nature of the business in which they are placed. Also allowing for a cross departmental experience.
- Approach to delivery of the NVQ should be underpinned by an anchor unit. For Young Apprentices it was identified that the Level 2 Unit 210 Research and report information should act as the anchor unit for the Level 2 work-based project. See Appendix A.

3.4. DISSEMINATION OF RESEARCH AT PARTNERSHIP WORKSHOPS

Representatives from each partnership were invited to regional events in Leeds and London respectively. Only the Leeds event was subscribed to by partnerships; however this report will be disseminated to all partnerships. Approximately 3 hours of this event was dedicated to disseminating key findings and introducing some recommendations for the work-based learning programme. See appendix B for minutes from the Leeds events.

4.1 RECOMMENDATIONS

The following recommendations are split in to sections, in line with the research. These sections are induction and selection, designing the work-based learning programme and supervision and monitoring.

Induction and selection:

- The induction programme should cover the following areas:
 1. Health and Safety in the workplace
 2. Attitudes and Behaviours at work
 3. Equal opportunities
 4. Child protection
 5. ERR – Use CfA ERR workbook as a resource.
 6. Industry visits/Employer talks
 7. Company information
 8. Job descriptions for placements
 9. Organisational charts
 10. Legislation in the workplace
 11. Interview Skills
 12. CV Writing
 13. Active listening and effective questioning
 14. Self promotion and motivation
 15. Dress code
 16. Use of office equipment
 17. Independent travel to work
 18. Preparation for work qualification
 19. Use of DfES Standards unit ref DFES/0477/2004 as a resource.

- When selecting placements for the Young Apprenticeship, partnerships can, where possible, concentrate on organisations that have the following:
 - 1) A variety of products or services: This can enable an eclectic experience of the workplace for the young people, gaining different perspectives and working with a variety of teams. This will also create opportunities for developing enterprise capability.
 - 2) Location: Logistical reasons must obviously be taken in to account and managed carefully where partnerships are in rural areas. However, introducing a journey to work which is slightly longer than a school journey gives the experience that much more credibility.
- Select placements based on information obtained from individual initial assessments, placement can be relevant to career progression aspirations determined in these assessments.
- Involve employers at the selection stage, through options days, programme tasters and interviews. This enables a competitive environment for placements for the young people. It also allows employers to be a part of the process from the outset and strengthen their commitment throughout. This is good risk management for partnerships trying to reduce employer drop out rates.

Designing and delivering the work-based learning programme:

- Early planning with employers is crucial to creating a coherent and valuable work placement. The key is creating a work-based learning programme which meets the requirements of the qualifications and also the needs of the employer.
- Involve Young Apprentices in the design of the work-based learning programme where possible during the period between September – December which is currently allocated to induction. This helps to build relations and trust between all parties involved.
- Introduce Level 2 Work-based projects to the work-based programme. See Appendix B & C for details on skills and identified generic units from Level 2 Business & Administration standards for use by the 14-16 age group. Appendix A also recommends the use of an anchor unit to underpin the entire project. Partnerships should develop the size of the project dependant upon the capability of the learner, the qualifications being used and the opportunities available in the employer's present business activity. It is important that the project is real in terms of its contribution to the employer and not a simulated project detached from real business activity. This is why early planning is crucial in creating satisfaction amongst all parties.
- The Young Apprentices should follow 4 supported stages throughout their project:
 - 1) Planning – this should include selection of topics/units, time and resource management, individual learning plans, communication plans.
 - 2) Commencement of project following plan set out in previous stage.
 - 3) Regular appraisals – this is where units are assessed individually and tasks are given recognition through portfolio development.
 - 4) Evaluation and report – Young Apprentices should report back to their class and tutors using unit 210 Research and report information as a standard for this part of the process. Use of PowerPoint is encouraged and some evidence from this presentation may be used to ascertain unit Level 2 unit 217 Using Presentation software or even Level 3 unit 312 Make a presentation as an additional unit. See Appendix C for further details on these units.
- The Level 2 work-based project should be clearly signposted or ideally mapped to other areas of the YA curriculum, including the core curriculum in school. i.e. ICT elements, literacy, numeracy, key skills, Technical certificates, BTEC etc.
- Assessment of the project should be done on a unit by unit basis to satisfy the requirements of the assessment strategy set out by the relevant awarding body. However, constructive feedback in the form of a report should be given by each relevant tutor and work supervisor with details of performance, adherence to planning, time and resource management, presentation skills and should include recommendations for improvement

Supervision and monitoring

- Partnership should consider funding mentoring and coaching skills qualifications for work placement supervisors. Further information can be found at www.ento.co.uk.
- Fortnightly reviews with young apprentices, less than an hour each time. These are not to be misconstrued with assessment visits and where possible should be a different person as it is possible for a conflict of interest to occur.
- Assessment is only required when the Young Apprentice is competent. This is set at approx 5 hours per unit per student, regardless of level.
- Use of CfA Supervisor role descriptor/support pack. (In development)



Young Apprenticeship Programmes

Activity two: What good looks like – holistic, planned and project-based approach to work-based programme at Level 2?

It is important that Young Apprentices have the opportunity to undertake tasks at their work placement that stretch them and make them understand the importance of business and administration tasks within every organisation in today's business market place. It is important that an element, if not all, of the work-based learning programme is pitched at Level 2.

Skills identified that are core within business and administration and underpin the knowledge and performance that Young Apprentices would use whilst on placement:

- Communication
- Planning
- Managing Time
- Solving Problems
- Evaluating
- Team working
- Reading
- Interpersonal Skills
- Questioning
- Listening
- Researching
- Presenting Yourself
- Summarising
- Using Technology

From this list of work place skills we have identified Level 2 units that we feel a Young Apprentice could achieve whilst on placement in industry. We have deliberately chosen generic units that will contribute to the individual personal development of work place skills for the Young Apprentice.

Core Units

- Unit 201 Carry out your responsibilities at work
- Unit 202 Working within your business environment

Optional Units

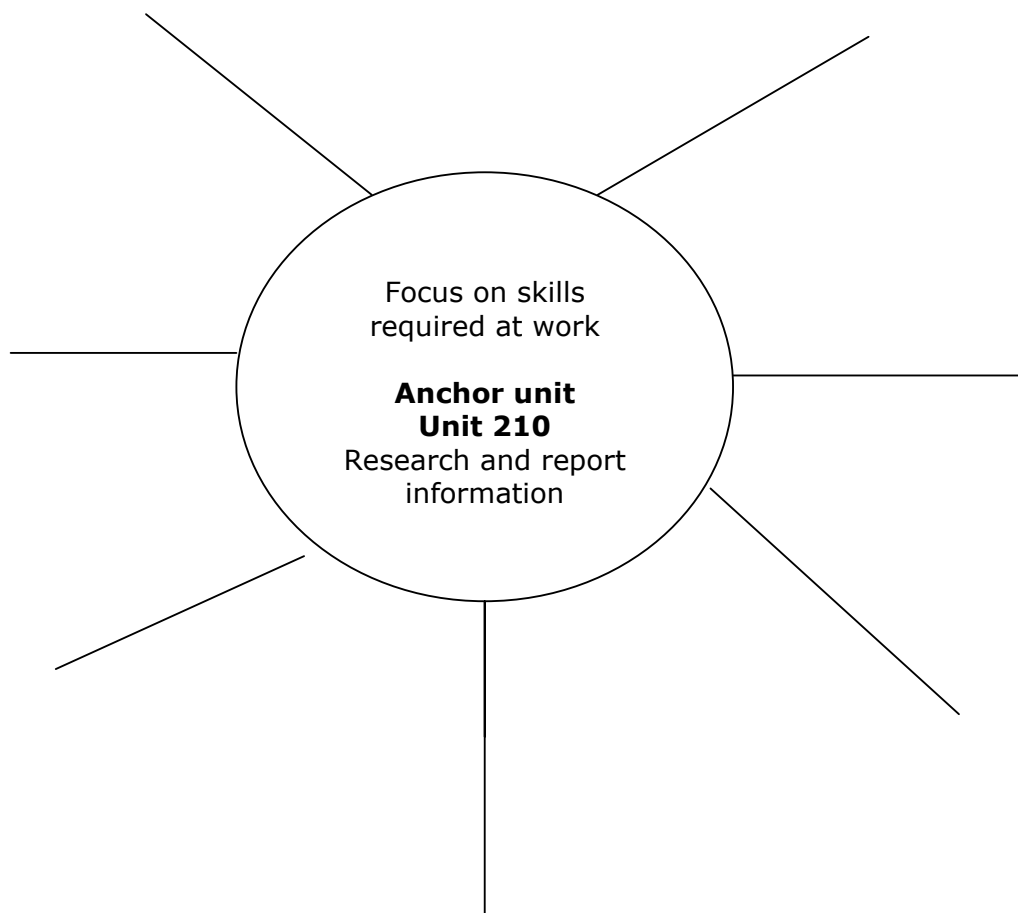
- Unit 110 Ensure your own actions reduce risks to H&S
- Unit 206 Deal with visitors
- Unit 209 Store, retrieve and archive information
- Unit 210 Research and report information
- Unit 211 Organise and support meetings
- Unit 219 Use a telephone system
- Unit 220 Operate office equipment
- Unit 224 Produce documents
- Unit 225 Work effectively with other people

Review the content of these units and choose five optional units that you feel could enhance the learning programme for your Young Apprentices and be the basis for a Level 2 work-based project.

Partnerships can develop as big or small a project as they wish to, it may cover the entirety of the NVQ L2 qualification or may just cover 2-3 units and be bolted on to the end of an existing NVQ L1 qualification as an enhancement and an opportunity to fast track progression on to the post-16 Apprenticeship.

Careful planning of the individuals learning placement is vital to maximise learning opportunities and to ensure that the YA appreciates the relevance of work based learning to the other learning undertaken at school and in college.

Task: We have chosen an **ANCHOR** optional unit to underpin the Level 2 work-based project. In pairs create a mock project using the units identified and go on to identify opportunities for a blended and holistic learning towards the Level 2 work-related qualification within the project you have developed. **You have 15 minutes. We have allowed 25 minutes for feedback on this activity.**



YA Regional Event – Leeds

Venue: Park Plaza Leeds, Boar Lane. 9:30 – 14:30

In attendance:

Wendy Place – Selby College
Andrea Watson – Selby College
Lynn King – York College
Karen Whittington – Leeds City Council
John Neal – Rotherham LEA/MAGNA
Joanne Secombe – Pro Co NW Ltd.
Kevin Benson – Interactive Training
Marjorie Hardy – Interactive Training
Joan Marshall – Barnsley LEA
Vic Ashley – CfA Regional Co-ordinator
Margaret Barkway – CfA Facilitator
Richard Thompson – CfA
Tracie Tod – CfA

Welcome

1. Richard Thompson welcomed all attendees for the event and gave housekeeping information.

Introductory update:

2. Richard Thompson gave an update on CfA activity and details of future developments. Offering support in developing C3 delivery models, selection process, attendance on p/ship steering groups, attendance at school options days/evenings, p/ship programme taster days: either through Richard or regional co-ordinators.

3. Post Office collaboration was discussed, p’ships welcomed this development and Richard stressed that p’ships will be thoroughly consulted in the development of a national WBL programme for Post Office. It was highlighted that we should tie in with Protocol skills on this as they are working closely with Royal Mail on apprenticeships/NVQ training. ACTION RICHARD

4. P’ships offered possibilities for employer case studies, especially those from Selby College, Leeds City Council and York College. ACTION TRACIE

5. Richard confirmed that much of the CfA's focus of the coming months would be on employer engagement: creating new placements and re-enforcing the reputation of the programme as a valuable one that produces competent and skilled employees of the future. This will be targeted through breakfast meetings.
ACTION RICHARD

Purpose of the day:

6. Richard Thompson went through the agenda for the day. See accompanying sheet.

7. Agenda: Suggestions for continuous improvement in p'ships. Introduced the DfES/LSC toolkit in packs. Approach to the WBL programme. Progression.

8. The key findings related to B&A from the York Consulting young people evaluation for C1 were presented. This led in to a comparative discussion between C1 and C2 programmes.

Open discussion about experiences so far:

9. Interactive Training (Marjorie Hardy) stated that C1 had been an unmitigated disaster, no YAs had finished the programme, this had been due to the late set up and disaffected pupils being selected by schools: a more robust selection process is now in place and C2 is seeing dramatic improvements. John Neal stated that he had not had the same issues in Rotherham and that they had managed to implement a sound selection process for C1 and there pupils were progressing well in C1 & C2. Karen Whittingham from Leeds City Council stated that C1 had been a problem for the same reasons as Interactive Training and C2 was an improvement. Joanne Secombe is C2 only and has had a v positive experience so far, only problem is that mock exams have coincided with elements of the YA programme, however this can be rectified for next time in close collaboration with schools. Lynn King stated that parents were dubious about taking away GCSEs and substituting in YA and so their YAs are still pursuing 7-8 GCSEs. Richard Thompson stressed that ideally the programme should be selected as the only viable option plus the core curriculum, however p'ships thought this was an unrealistic expectation. John Neal from Rotherham said that he pays his school from p'ship funding to supply catch up study where required (lunch times and after school sessions), this way the pupils are able to stretch themselves with YA plus full suite of GCSEs.

10. All p'ships said that employer engagement was the biggest issue for YA and Richard Thompson re-assured again that this would be the focus of CfA future activity. ACTION RICHARD

11. Wendy Place asked the question why we preferred that the WBL be Level 1, Richard responded that L2 stunted progression possibilities immediately at post-16 but the main reason was that L2 NVQ had not been on section 96 at conception of programme. Now it is and is on the annex of quals suggested by CfA therefore p'ships are encouraged to go for this where possible, a differentiated approach would be best dependant on the learners, spiky profile of L1 AND L2 is possible too which is why the NVQ L1 would not be phased out of the offer for YA.

12. Activity 1 – Led by Margaret Barkway: A blended approach to activities.

P'ships were asked to identify activities they currently used which use varying resources and styles and that target more than one element of the YA curriculum:

- Selby College: Business Development activity: Select and market their own pop group. Covers the NVQ, TC and elements of GCSE Applied Business. – Presented at Flamingo Park. – This was identified as a great case study to publicise.
- Interactive Training: ECDL – qualification in it's own right but also links in with ICT in core curriculum. Text Processing is the same. Preparation for work qual which overlaps with TC in induction period.
- York College: Real working environment within college, verified by awarding body. Delivers CLAIT, Text processing, NVQ L1, TC, overlaps with ICT in core curriculum.
- Pro Co NW Ltd & Leeds City Council: Reflective journal on + & - experiences. Covers literacy, key skills and English in core curriculum.
- Day trips and visits to industry.
- Employment skills qualification: feeds in to TC and NVQ.
- John Neal: Health and safety, first aid, manual handling as additional qual, this is delivered at end of Y9 which can have overlap with TC and NVQ plus ICT core curriculum.

Standards Unit resource for business was promoted here to p'ships. The contact details for p'ships to order a copy was given.

13. Margaret Barkway discussed the idea of promoting the programme and p'ships offered examples of how they do this:

- Assemblies
- Open Evenings/Options evenings
- Programme taster days
- Competitive selection process

It was stressed that due to the small scale nature of the programme promotion is restricted.

14. P'ships were then asked to create new ideas for activities that will take a blended approach and target more than one area of the YA programme:

- Outward bound experience: day trips etc
- Health and safety risk assessments.

15. Problems with developing the programme were time constraints. P'ships said that the days they had allocated for YA were the contact hours only and so they were struggling to find the time to develop the programme as they wanted. Richard Thompson suggested that they may need to re-evaluate the structure of their p'ship to allow for development, and also that the CfA would be happy to pursue developments on behalf of p'ships should they request it. Issues around the distribution of funding throughout p'ships were discussed, delivery teams who are responsible for developing as well as delivering are not seeing a large enough portion of the money, an LLSC issue that can be raised by the CfA at the national operation group meetings with LSC/DfES teams. ACTION RICHARD

16. Issues were raised around the communications with schools by Selby College, the co-operation from teaching staff was not there therefore making it difficult to blend the rest of the YA programme with the core curriculum taught in school. John Neal from Rotherham said that he did not have the same problems as they had regular steering groups/meetings with school management and delivery staff which enabled them to have a strong channel of communication. ACTION P'SHIPS.

17. Activity 2 Led by Margaret Barkway– A planned, holistic and project-based approach to the Work-based learning programme. P'ships were asked to develop a WB project using identified units from the L2 NVQ in B&A, using an anchor unit which focuses the approach. Conclusions from this were that projects should have a purpose and will help to eradicate the C1 feedback from York that the w/experience is repetitive and uninspiring. A full report on these recommendations will be available to p'ships on www.cfa.uk.com/ya at the end of the month. P'ships received these recommendations well and feedback will be pursued by the CfA from partnerships when these are implemented/piloted. ACTION RICHARD

18. www.cfa.uk.com/ya and www.breakinto.biz websites were demonstrated by Richard Thompson and Tracie Todd respectively, the latter being introduced in the context of a discussion point with YAs when addressing progression in the B&A sector.

19. Progression: Richard Thompson led a discussion on p'ship approaches to progression and discussed each possible option.

- Leeds City Council: Use the progress log to focus their look at progression and discussed progression with parents. They are also a provider of the post-16 app in B&A and will actively promote this as an option over the coming months. Use of role models from post-16 apps, advanced apps and those who are in management job roles that begun on a post-16 app.
- Selby College: Connexions have just come on board for C2 pupils.
- Pro Co NW Ltd: C2, nothing in place at moment. However will actively promote the fast track option of post-16 app after YA.

20. Issues around the education of parents were discussed: Why do they not like the post-16 app route? Why do they prefer the FE route? Richard Thompson recommended use of www.breakinto.biz website as earlier presented as a tool to educate parents.

21. It was concluded that we should not have the expectation that the YAS should progress on to the post-16 app in B&A but any post-16 app. At present we sell the YA programme as one that equips young people with transferable skills and so to then promote only one option of post-16 apprenticeship for progression would be contradictory?

21. FE route was discussed as the favourite route, due to parental pressure on YAs plus the fact that Education Maintenance allowances are given to those in FE and in post-16 apps, however FE = 16 hours and post-16 app = 30 for the same money. FE will also be a preference for this reason. It was stressed that the FE route chosen had a Business focus as a result of this programme.

22. The learning agreement pilot was discussed, however much clarification is needed on this and the CfA will look in to this. ACTION RICHARD.

23. Any other business. No other issues. Richard Thompson confirmed that minutes from the meeting plus a copy of the report on recommendations for improving the work experience would be distributed to all p'ships.

Unit 201 Carry out your responsibilities at work**Unit Summary**

Communicate effectively, accept responsibility for own work and its delivery, improve own performance and behave in a way that encourages effective working.

Skills

You will apply the following skills:

- Communicating
- Planning
- Managing time
- Solving problems
- Evaluating
- Team working

Performance indicators

You will:

Communicate information

1. Actively focus on information that other people are communicating, questioning any points you are unsure about
2. Provide accurate, clear and structured information confidently to other people and in a way that meets their needs
3. Make useful contributions to discussions
4. Confirm and read written material that contains information that you need
5. Extract the main points you need from written material
6. Provide written information to other people accurately and clearly

Plan and be accountable for your work

7. Agree realistic targets and an achievable timescale for your work
8. Plan how you will make best use of your time and the other resources you need
9. Confirm effective working methods
10. Identify and report problems when they arise, using the support of other people when necessary
11. Keep other people informed of your progress
12. Meet your deadlines or renegotiate timescales and plans in good time
13. Take responsibility for your own work and accept responsibility for any mistakes you make
14. Follow agreed guidelines, procedures and, where appropriate, codes of practice

Improve your own performance

15. Encourage and accept feedback from other people
16. Use feedback to agree ways to improve your own work and put improvements into practice
17. Agree where further learning and development could improve your performance
18. Follow through a learning plan that meets your own needs
19. Review your progress and update your learning plan

Behave in a way that supports effective working

20. Set high standards for your work and show commitment in achieving these standards
21. Understand your own needs and rights
22. Show a willingness to take on new challenges
23. Adapt readily to change
24. Treat other people with honesty, respect and consideration
25. Help and support other people

Knowledge

You will know:

1. Why effective communication is important
2. How to focus actively on what others are communicating
3. Why it is important to question things you are not sure about
4. How to structure and present information clearly and accurately
5. Why it is important to adapt the way you communicate to meet the needs of other people
6. Why it is important to seem confident when communicating with others
7. How non-verbal communication affects the impact you have on other people
8. How to contribute positively to discussions
9. Where to find written information that you need as for work
10. How to pick out the main points you need from written information
11. How to provide written information in a way that meets other people's needs
12. Why it is important to plan your work and be accountable to others
13. How to agree realistic targets for your work and why this is important
14. How to plan your work
15. The types of problems that may occur during your work and how to report them
16. Why it is important to keep other people informed about progress
17. Why you should give other people sufficient notice if you need to revise your plans
18. Why it is important to acknowledge and learn from your mistakes
19. Guidelines, procedures and codes of practice that are relevant to your work
20. Why it is important to try to continuously improve your work
21. Why it is important to encourage and accept feedback from others
22. How learning and development can help you to improve your work and further your career
23. The main career progression routes available to you
24. Learning and development opportunities that are available to you
25. Why the way you behave in the workplace is important
26. Why it is important to set high standards for your work and how to set these standards
27. Why it is important to be ready to take on new challenges and adapt to change
28. Why it is important to treat others with honesty, respect and consideration
29. The types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not
30. How to help and support others and why this is important

Unit 202 Work within your business environment

Unit Summary

Work effectively within your organisation, supporting its purpose and values, applying employment rights and responsibilities, respecting diversity and protecting security and confidentiality.

Skills

You will apply the following skills:

- Planning
- Reading
- Communicating
- Interpersonal skills
- Team working

Performance indicators

You will:

Work to achieve your organisation's purpose and values

26. Work in a way that supports your organisation's overall mission and your team's objectives
27. Follow the policies, systems and procedures that are relevant to your role
28. Put your organisation's values into practice in all aspects of your work
29. Work with outside organisations and individuals in a way that protects and improves the image of your organisation
30. Seek guidance from others when you are unsure about objectives, policies, systems, procedures and values

Apply your employment responsibilities and rights

31. Access information about your employment rights and responsibilities
32. Carry out your responsibilities to your employer in a way that is consistent with your contract of employment
33. Understand your employment rights
34. Seek guidance when you are unsure about your employment responsibilities and rights

Support diversity

35. Interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs
36. Learn from other people and use this to improve the way you work and interact with others
37. Follow your organisation's procedures and legal requirements in relation to discrimination legislation

Maintain security and confidentiality

38. Maintain the security of property in a way that is consistent with your organisation's procedures and legal requirements
39. Maintain the security and confidentiality of information in a way that is consistent with your organisation's procedures and legal requirements
40. Report any concerns about security and confidentiality to an appropriate person

Knowledge

You will know:

1. The sector in which your organisation operates
2. Your organisation's mission and purpose
3. How your organisation compares to other organisations in the sector
4. Your main responsibilities at work
5. How your role fits into your organisation's structure and contributes to its operation
6. The policies, procedures, systems and values of your organisation that are relevant to your role
7. How to apply your organisation's values and policies
8. Who you should consult if you are unsure about policies, objectives, systems and values
9. Which aspects of employment are covered by law
10. Any industry-specific legislation and regulations that are relevant to your role
11. Why legislation is important in upholding and protecting the rights of both employer and employee
12. The main terms and conditions of your contract of employment
13. Who you should contact if you have a grievance at work or need guidance and support on an employment issue
14. What you should do if you witness or experience discrimination or bullying at work
15. What procedures you should follow if you are ill or need time off from work
16. The types of information that are recorded in personnel records, why these are needed and what to do if you need to report changes to this information
17. What is meant by 'diversity' and why it should be valued
18. How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs
19. The ways in which you could learn from others
20. The importance of maintaining security and confidentiality
21. The legal and organisational requirements in relation to security and confidentiality
22. The procedures you should follow if you have concerns about security and confidentiality

Unit 209 Store, retrieve and archive information

Unit Summary

Use a manual or electronic information system to store, retrieve and archive information.

Skills

You will apply the following skills:

- Planning Using technology
- Organising Communicating
- Reading Problem solving
- Writing Using number

Performance indicators

You will:

Process information

1. Identify and collect required information
2. Follow agreed procedures & legislation to maintain security & confidentiality
3. Store information accurately in approved locations
4. Update information as required

Retrieve information

5. Confirm information for retrieval
6. Comply with procedures and legislation for accessing an information system
7. Locate and retrieve the required information
8. Identify and report problems with information systems
9. Provide information in the agreed format and within agreed timescales

Archive information

10. Confirm information to be archived
11. Comply with procedures and legislation for archiving information
12. Archive information correctly and within agreed timescales
13. Maintain a record of archived information
14. Retrieve archived records on request

Knowledge

You will know:

1. Why it is important to store, retrieve & archive effectively & efficiently
2. The different information systems and their main features
3. Legal and organisational requirements covering the security and confidentiality of information
4. Why it is important to confirm information to be collected, stored, retrieved and archived
5. The methods you can use to collect required information
6. The procedures you should follow to access information systems
7. How to make sure information is accurate
8. The problems that occur with information systems and who to report them to
9. Why it is important to provide information in the required format and within agreed timescales
10. When information should be archived and the procedures to follow

Unit 210 Research and report information

Unit Summary

Research and report information.

Skills

You will apply the following skills:

- Planning
- Researching
- Organising
- Reading
- Writing
- Using number
- Communicating
- Using technology
- Presenting information

Performance indicators

You will:

Research information

41. Confirm aims and objectives and deadlines for the information search
42. Confirm relevant sources of information
43. Search for and obtain information to meet deadlines
44. Record the information
45. Maintain a record of sources used

Report information

46. Organise the information in a way that will help analysis
47. If necessary, get feedback on what you have found
48. Present information in the most appropriate format, accurately and on time

Knowledge

You will know:

1. How to research information efficiently and accurately
2. The types of information you are required to obtain
3. Why it is important to agree aims, objectives and deadlines
4. About relevant information sources and search methods
5. Why you should maintain a record of sources you have used and how to do so
6. How to organise information in a way that will help analysis
7. The different formats that may be required when reporting information

Unit 211 Organise and support meetings

Unit Summary

Prepare for and support meetings and assist with follow-up activities.

Skills

You will apply the following skills:

- Planning
- Organising
- Communicating
- Checking
- Managing resources
- Managing time
- Writing
- Interpersonal skills

Performance indicators

You will:

Prepare for meeting

49. Confirm the meeting brief
50. Confirm the venue, equipment and catering requirements
51. Produce the agenda and meeting papers in line with instructions
52. Invite attendees and confirm attendance
53. Make sure attendees' needs are met
54. Collate and dispatch papers for the meeting within agreed timescales
55. Produce spare copies of meeting papers
56. Arrange the equipment and layout of the room

During the meeting

57. Make sure attendees have a full set of papers
58. Take accurate notes of the meeting including attendance
59. Provide information and support when required

After the meeting

60. Produce a record of the meeting
61. Seek approval and amend the meeting record as necessary
62. Circulate the meeting record to agreed timescales

Knowledge

You will know:

1. The role of the person organising and supporting the meeting
2. How to plan and support meetings effectively and efficiently
3. The types of meetings and their main features
4. Why it is important to confirm the meeting brief
5. The types of information that attendees will need
6. The types of resources that will be needed for different types of meetings
7. Any special requirements that attendees may have and how to meet these
8. Health, safety and security requirements when organising meetings
9. The types of information and support you may be asked to provide
10. What should be included in a record of the meeting
11. Why it is important that you make sure the record is accurate and is approved

Unit 217 presentation software

Unit Summary

Use software applications to produce presentations, which include a combination of media. This is based on the e-skills Area of Competence: Presentation Software, Level 2 unit.

Skills

You will apply the following skills:

- Planning
- Organising
- Summarising
- Writing
- Communicating
- Using technology
- Checking

Skills and Techniques

You will:

63. Use appropriate techniques to handle, organise and save files
64. Link information within the same type of software
65. Add information from one type of software to information produced using different software, such as a spreadsheet graph to a word processing document; text to an image file; picture to a presentation slide; or simple information from a database onto a website
66. Use a wide range of editing techniques appropriately for more complex presentations such as inserting objects and other resources, resizing images and changing the position or orientation of other objects
67. Use proof reading techniques to check that text and images look professional
68. Check text formatting techniques are used appropriately
69. Check images and other objects are positioned and edited appropriately
70. Format complex presentations using appropriate tools and techniques, such as changing colour schemes for slides or using an organisational house style
71. Choose an appropriate method and presentation style to suit audience needs
72. Choose, use and adjust templates for presentations
73. Save a presentation as a slide show
74. Print speaker notes

Knowledge and Understanding

You will know:

1. How to produce information that communicates clearly and accurately with the audience, where and when it is needed
2. How to produce more complex presentations for a wide variety of uses. More complex presentations consist of electronic slides that include animation. They are well structured and appropriately styled so that they communicate effectively
3. How to include still images (e.g. downloading photos from a digital camera) and other objects produced using different software

Unit 219 Use a telephone system

Unit Summary

Use a telephone system to make, receive and transfer internal and external calls; and to check and deal with recorded messages.

Skills

You will apply the following skills:

- Questioning
- Listening
- Researching
- Communicating
- Presenting yourself
- Summarising
- Using technology
- Problem solving

Performance indicators

You will:

Making calls

1. Identify the purpose of the call
2. Obtain the name and numbers of the person to be contacted
3. Make contact with the person
4. Communicate information to achieve the purpose of the call
5. Project a positive image of yourself and your organisation
6. Summarise the outcomes of the conversation before ending the call

Receiving calls

7. Answer the phone according to your organisation's procedures
8. Project a positive image of yourself and your organisation
9. Identify the caller, where they are calling from and what they need
10. Provide accurate and up-to-date information whilst protecting confidentiality and security
11. Transfer calls where requested
12. Take and relay messages according to the caller's needs
13. Summarise the outcomes of the conversation before ending the call

Dealing with message systems

14. Keep your message system up-to-date
15. Check the system for callers' messages
16. Respond to callers' messages within agreed timescales
17. Delete messages when you have dealt with them
18. Leave recorded messages on other people's systems that achieve their purpose

Knowledge

You will know:

1. The different features of telephone systems and how to use them
2. Why it is important to identify the purpose of a call before you make it
3. The different methods you can use to obtain the names and numbers of people that you have to make contact with
4. How to use telephone systems to make contact with people inside and outside your organisation
5. Why it is important to project a positive image of yourself and your organisation
6. Why it is important to summarise the outcomes of a telephone conversation before ending the call
7. How to follow your organisation's procedures when making and receiving calls
8. How to identify the caller and their needs
9. Why it is important to give accurate and up-to-date information to callers
10. Why confidentiality and security are important when dealing with callers
11. The types of information that could affect confidentiality and security and how to handle these
12. How to identify the appropriate person to whom you should transfer a call
13. The information you should give when transferring calls, taking or leaving messages
14. The different types of message systems and their main features
15. Why it is important to keep your message system up-to-date

Unit 220 Operate office equipment

Unit Summary

Operate a range of office equipment to carry out administrative tasks.

Skills

You will apply the following skills:

- Planning
- Organising
- Problem solving
- Communicating
- Using technology

Performance indicators

You will:

19. Locate and select the equipment and resources you need for the task
20. Follow the manufacturer's operating instructions
21. Waste as few resources as possible
22. Keep the equipment clean and hygienic
23. Deal with equipment and resource problems according to the manufacturer's and organisational procedures
24. Make sure the final work product meets the required standard
25. Produce work product within agreed timescales
26. Make sure the equipment, resources and work area are ready for next user

Knowledge

You will know:

1. The different types of office equipment, their features and what they can be used for
2. How to choose equipment and resources that are appropriate for a range of administrative tasks
3. Why it is important to follow manufacturers' instructions when operating equipment
4. Why it is important to keep waste to a minimum and how to do so
5. Why it is important to keep equipment clean and hygienic and what the appropriate standards are
6. Why it is important to follow manufacturers' instructions and organisational procedures when dealing with equipment faults
7. The types of equipment and resource faults you are likely to experience and how you should deal with these
8. Why it is important to meet work standards and deadlines
9. Why it is important to leave the equipment, resources and work area ready for the next user and what the appropriate standards are

Unit 224 Produce documents

Unit Summary

Produce high quality, attractive documents to agreed specifications.

Skills

You will apply the following skills:

- Listening
- Questioning
- Reading
- Organising
- Managing time
- Checking
- Using technology
- Writing

Performance indicators

You will:

75. Confirm the purpose, content, style, quality standards and deadlines for the document
76. Prepare the resources you need
77. Organise the content you need
78. Make efficient use of the technology available
79. Produce the document in the agreed style
80. Integrate non-text objects in the agreed lay-out
81. Check for accuracy, editing and correcting as necessary
82. Seek clarification when necessary
83. Store the document safely and securely in an approved location
84. Present the document in the required format within agreed deadlines and quality standards

Knowledge

You will know:

1. Why it is important to produce high quality and attractive documents
2. The different types of documents that you may be asked to produce and the document styles you should use
3. The different formats in which the text may be presented
4. Why it is important to confirm the purpose, content, style, quality standards and deadlines for the document
5. The different types of technology available for inputting, formatting and editing text and their main features
6. The types of resources you need to produce high quality and attractive documents
7. How to organise the content you need for the document
8. How to integrate and lay out text and non-text
9. How to check for accuracy and correctness – including spelling and grammar – and why this is important
10. Why it is important to store the document safely and securely and how to do so
11. The importance of confidentiality and data protection
12. Why it is important to meet quality standards and deadlines

Unit 225 Work effectively with other people

Unit Summary

Work with other people in a way that achieves agreed goals and objectives.

Skills

You will apply the following skills:

- Communicating
- Team working
- Planning
- Negotiating
- Managing time
- Problem solving
- Resolving disagreement

Performance indicators

You will:

27. Communicate effectively with other people
28. Welcome opportunities to work with other people when this will achieve a positive outcome
29. Share work goals and plan work objectives, priorities and responsibilities together
30. Work in a way that makes best use of your abilities and the abilities of others
31. Show respect for individuals
32. Produce quality work on time
33. Identify and solve problems
34. Share feedback with others on the achievement of objectives

Knowledge

You will know:

1. Why it is important to work effectively with other people
2. The situations in which working with others can achieve positive outcomes
3. Why effective communication is important
4. When it is essential to communicate with the people you work with
5. Why it is important to share work goals and plans when working with others
6. Why it is important to acknowledge the strengths of others and to balance your abilities with theirs
7. The value of diversity in teams
8. Why it is important to respect the individuals you work with
9. Why it is important to agree quality measures with the people you work with
10. The types of problems and disagreements that occur when working with others and how to resolve them
11. Why it is important to give and receive constructive feedback
12. How to make use of feedback to improve your own work, the work of others and the team as a whole

Unit 312 Make a presentation

Unit Summary

Present information to an audience and deal with their questions.

Skills

You will apply the following skills:

- Negotiating
- Researching
- Summarising
- Planning
- Organising
- Writing
- Communicating to groups
- Managing time
- Using technology
- Evaluating

Performance indicators

You will:

Before the presentation

85. Agree the purpose, content, style and timing of the presentation
86. Research and plan the presentation
87. Prepare the presentation to achieve its purpose
88. If appropriate, obtain feedback on the presentation
89. Practise and time the presentation
90. Produce presentation handouts

At the presentation

91. Check equipment and resources
92. Circulate presentation handouts and materials
93. Address the audience and make the presentation, summarising your key points
94. Provide the audience with the opportunity to ask questions
95. Respond to questions in a way that meets the audience's needs

After the presentation

96. Collect feedback on the presentation
97. Evaluate the presentation and identify improvements

Knowledge

You will know:

1. The advantages and disadvantages of using presentations to provide information
2. Different ways of making presentations and their features
3. Why it is important to agree the purpose, content, style and timing of presentations before planning and preparation
4. How to prepare presentations so they are attractive, interesting, concise and informative
5. Why it is important to practise presentations and how to do so
6. Why it may be important to get feedback on your prepared presentation
7. How handouts can complement presentations
8. The types of equipment used for presentations and why it is important to check these in advance
9. Why it is important to speak clearly and convey the main points of a presentation and how to gauge whether you are doing so
10. Why it is important to summarise your points
11. Why it is important to give opportunities to the audience to ask questions