

SVQ in Business and Administration Level 1 (4436-01)

Qualification handbook for centres
GA4K 21



www.cityandguilds.com
May 2011
Version 4.0

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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualifications:

Qualification title and level	City & Guilds qualification number	Qualification accreditation number	Registration and certification
SVQ in Business and Administration Level 1	4436-01	GA4K 21	See Walled Garden/online catalogue for last dates

The City & Guilds SVQ in Business and Administration Level 1 meets the needs of candidates who work or want to work in an administrative support role. Suitable for the young or adult learner these foundation learning qualifications cover essential skills and knowledge related to working in a business environment which can be transferred to any type of organisation and industry.

These competence based qualifications replace the City & Guilds 4404 Level 1 SVQ in Business and Administration. These qualifications are based on national occupational standards developed by the Council for Administration (CfA) and were designed in collaboration with City & Guilds and other awarding organisations. They include imported ITQ units developed by e-Skills.

Contacting the Sector Skills Councils/Standards Setting Bodies

CfA
Tel: 020 7091 9620
Fax: 020 7091 7340
Email: info@cfa.uk.com
Website: www.cfa.uk.com

e-skills UK
Tel: 020 7963 8920
Fax: 020 7592 9138
Email: info@e-skills.com
Website: www.e-skills.com

1.1 Qualification structure

To achieve the SVQ in Business and Administration Level 1 the learner **must achieve 6 units**:

- **Two units** from **Group A: Mandatory Units**
- At least **three units** from **Group B: Optional Units**
- **One further unit** must be selected from either **Group B: Optional Units** or **Group C: Optional Units**
- At **least four units** must be selected from **level 1 units**.

The following rules apply to how units may be selected:

- Either unit S109 (B2:Document Production) or S212 (B2:Document Production) may be selected but not both

The table below illustrates the unit titles and the credit value of each unit the qualification will be awarded to candidates successfully completing the required combination of units.

Key to table: **A** – Mandatory, **B** – Optional, **C** – Optional

City & Guilds unit	Unit title	Level	Group A/B/C	Barred combination	Unit selected?
4436-102	Support work procedures in a business environment	1	A		
4436-105	Understand how to communicate in a business environment	1	A		
4436-101	Accept instructions to manage and improve own performance in a business environment	1	B		
4436-103	Contribute to solving business problems	1	B		
4436-104	Contribute to working with others in a business environment	1	B		
4436-109	Prepare text from notes using touch typing (20 wpm)	1	B	212	
4436-212	Prepare text from notes	2	B	109	
4436-223	Support the organisation of business travel or accommodation	2	B		
4436-106	Make and receive telephone calls	1	B		
4436-107	Assist in handling mail	1	B		
4436-250	Meet and welcome visitors	2	B		
4436-110	Use a filing system	1	B		
4436-111	Archive information	1	B		
4436-220	Use office equipment	2	B		
4436-112	Use occupational and safety guidelines when using keyboards	1	B		
4436-113	Using email 1	1	C		
4436-124	Word processing software 1	1	C		

1.2 Opportunities for progression

On completion of these qualifications candidates may progress into employment or to the following City & Guilds qualifications:

- Level 2 Certificate in Principles of Business and Administration (4475)
- Level 2 SVQ in Business and Administration (4436-02)
- Level 2 SVQ in Customer Service (4427)
- Level 2 Certificate/Diploma for Legal Secretaries (7466)
- Level 2 Certificate/Diploma in Medical Administration (4419)
- Apprenticeship in Business and Administration

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for these qualifications:

Description	How to access
Promotional materials	www.cityandguilds.com
SmartScreen (ITQ units)	www.smartscreen.co.uk

2 Centre requirements

This section outlines the approval processes for Centres to offer these qualifications and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres currently approved to offer the 4404 Level 1 SVQ in Business and Administration will be given automatic approval for the new Level 1 SVQ Award/Certificate in Business and Administration. Existing sanctions will also apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1 Resource requirements

Human resources

Staff delivering Business and Administration units within these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent to make Business and Administration assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) of for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

- Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications

or

- A trainer, supervisor or manager, employed by an organisation must either:
 1. hold or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications
 - or
 2. seek guidance and approval from City & Guilds to demonstrate that the
 - organisation has appropriate processes in place to facilitate assessment, moderation or verification functions

- trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

For imported units please refer to the e-Skills Assessment strategy on the 7574 ITQ qualification pages www.cityandguilds.com or from www.e-skills.com

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualification(s) successfully.

To be awarded a SVQ in Business and Administration, candidates must demonstrate that they are able to perform the job or an appropriate task competently. Competence may be demonstrated in the private sector, not-for-profit sector or public sector. Candidates may be employed as full-time, part-time, paid or voluntary members of staff.

The assessment of all units at any level of a Business and Administration SVQ or competence-based qualification, '... may be based on either candidate performance at work or through simulation, as necessary'¹.

As part of the assessment for this qualification, candidates must have access to a work or realistic work environment (RWE).

Realistic work environments

Where the candidate is subjected to a work environment and is producing performance evidence subject to all of the following conditions:

- time pressures
- work problems
- accountabilities
- office environment
- tools to do the job.

eg learners in a model or virtual office.

External verifiers will need to approve RWEs on an individual basis before any assessment can begin. Authenticity is essential and approval needs to be endorsed on an annual basis by the external verifier.

Simulation

If a unit or part of a unit at any level is simulated, it must be undertaken in a RWE.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where

- there is a high risk to the security or safety of the candidate, individuals, key people in their lives and others

¹ See CfA Assessment Strategy 2009, Business and Administration NOS, December 2009.

- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

An example of a simulated task is one that is not going to be used by a third party but meets all the rigour of an RWE, ie where the candidate is subjected to work timelines, prioritising, interruptions of a working environment etc.

For imported units please refer to the e-Skills Assessment strategy on the 7574 ITQ qualification pages **www.cityandguilds.com** or from **www.e-skills.com**

Age restrictions

These qualifications are approved for candidates aged 14 yrs or over.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification(s). This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification(s) they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualifications they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualifications.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualifications. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Business and Administration unit
- Guidance notes in each ITQ unit (available within the 4436 Imported units document or 7574 ITQ documentation from www.cityandguilds.com)
- Useful material is available on SmartScreen, www.smartscreen.co.uk
- Useful material is also available from www.cfa.uk.com, www.e-skills.com

4 Assessment

4.1 Summary of assessment methods

For these qualifications, candidates will be required to complete the following assessments:

- a portfolio of evidence
- For imported ITQ units the City & Guilds 7574/7266 assignments are an acceptable alternative method of assessment.

City & Guilds provides the following assessments:

- Assignments and assignment guidance for imported ITQ units can be downloaded from the 7574 or 7266 qualification pages on www.cityandguilds.com
- Sample assignments can also be downloaded from the 7574/7266 sections on SmartScreen.

Time constraints

The following time constraints must be applied to the assessment of these qualifications:

- Assessment must be completed within the candidate's period of registration.
- Indicated time allowances must be followed if using the 7574/7266 assignments to assess the imported ITQ units.

4.2 Evidence requirements

Evidence requirements have been included for each Business and Administration unit. Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

Naturalistic observation of workplace activities: Assessors must provide information about the context of the assessment.

Products: Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records. Assessment centres using 'paperless portfolios' should first discuss their approach to assessment with their awarding organisation.

Expert witness: Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.

Witness testimony: Can provide valuable evidence of candidate competence. In line with established principles, witness testimony must be:

- a clear, authentic statement indicating how the learner carries out their job
- dated, signed and include the job title of the witness.

Candidate reports (feedback): Oral or written reports from the candidate which involve descriptions of activities and processes and some self-assessment, eg a work diary.

Reflective accounts: A reflective account is usually a write up of how a candidate has carried out part of their job, recording events that actually happened. Where possible, the account should state why the candidate took the actions they did.

Recognition of prior learning (RPL) / achievement (RPA): May be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL/RPA must be authentic, current, valid, relevant and sufficient.

Professional discussion: Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.

Verbal/written questions: Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge, questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate.

Projects: An extended piece of practical and / or written work involving planning and research, generally presented as a report.

Assignments: May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.

Case studies: An effective case study report should:

- clearly identify the core problem(s)
- analyse the issues underlying the problem
- discuss and justify alternative solutions using theory / experience
- present feasible recommendations
- be presented in an appropriate format.

Audio/video recordings: May be used to support observation reports, examination of work products and knowledge questionnaires.

Simulation/role play: A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment'².

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit. The most appropriate forms of evidence should be selected for each unit or part of a unit.

Characteristics of assessment guidance

The candidate may produce evidence from a range of examples (as outlined above) which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the candidate's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of a Business and Administration SVQ unit.

The assessor will need to be assured that the learner can:

- consistently perform the job or tasks to the required level of competence
- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit.

All examples of evidence submitted for assessment of a unit must be:

² See Assessment Strategy, 2009 Business and Administration NOS, December 2009, clause 4.2.

- current
- sufficient
- relevant
- appropriate
- authentic
- fair.

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the candidate, the assessor and, perhaps, their employer.

Holistic assessment

The approach to assessing evidence should aim to be holistic; that is, evidence in support of one unit or part of a unit may be used in part for aspects of another unit. Many of the SVQ units from the Business and Administration suite are interrelated and evidence from one unit may equally be applied to part of the evidence requirements of another unit.

Using a holistic approach to assessment will:

- enrich the assessment process for the candidate and the assessor by bringing together elements of different units
- make more sense to the candidate and avoid duplication of assessment
- provide a rigorous approach to the assessment process
- allow for evidence for particular units to be drawn from a range of activities, thus making it easier to cover aspects that may not occur in a one-off assessment
- efficiently use assessment opportunities and reduce over-assessment
- be cost effective.

Holistic assessment will minimise repetition, time and the burden of assessment on all parties involved in the assessment process. This should not prevent individual units being signed-off as they are completed.

Using other related qualifications as evidence

Other qualifications can be used as supporting evidence in a candidate's portfolio. The qualification must be current and be benchmarked to one or more of the Business and Administration SVQ units. However, it will only be supporting evidence, as assessors must still make judgments about how the learner demonstrates competence at work.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds has also developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate. **SVQ Recording forms** are available on the City & Guilds website.

Although it is expected that new centres will use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4.4 Recognition of prior learning/achievement (RPL/RPA)

Recognition of Prior Learning/Achievement (RPL/A) recognises the contribution a person's previous experience could contribute to a qualification.

RPL/RPA for Business and Administration units may be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL/RPA must be authentic, current, valid, relevant and sufficient.

Please refer to the e-Skills Assessment strategy for guidance on RPL/RPA for imported ITQ units. Available from the 7574 ITQ qualification pages on **www.cityandguilds.com** or from **www.e-skills.com**

5 Units

Availability of units

The Business and Administration units for these qualifications follow.

Imported units are contained in the '4436 Imported units' document available to download from the 4436 qualification pages on **www.cityandguilds.com**

Structure of units

The units in these qualifications are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- unit aim

Unit 101

Accept instructions to manage and improve own performance in a business environment (S101)

Level: 1

What is the unit about?

This unit is about accepting instructions to take responsibility for own work and its delivery; improving own performance and behaving in a way that encourages effective working.

Specific skills

- Analysing
- Planning
- Using technology
- Communicating
- Presenting information
- Decision-making
- Problem-solving
- Organising
- Researching

Performance indicators

1. Be accountable for own work

- 1.1 Accept instructions given by authorised people and follow these instructions, checking any points not understood.
- 1.2 Agree how to make best use of own time and the working methods to be used.
- 1.3 Follow the correct procedures to deal with problems, using the support of other people when necessary.
- 1.4 Keep other people informed of own progress.
- 1.5 Take responsibility for own work and accept responsibility for any mistakes made.
- 1.6 Follow agreed guidelines, procedures and, where appropriate, codes of practice.

2. Behave in a way that supports effective working

- 2.1 Set achievable standards for own work and show commitment to achieving these standards.
- 2.2 Understand own needs and rights.
- 2.3 Show a willingness to take on new challenges.
- 2.4 Adapt readily to change.
- 2.5 Treat other people with honesty, respect and consideration.

3. Improve own performance

- 3.1 Accept feedback from other people.
- 3.2 Use feedback to agree ways to improve own work and put them into practice.
- 3.3 Follow through a learning plan that meets own needs.
- 3.4 Review own progress with a learning plan.

Knowledge and understanding

1 Be accountable for own work

- 1.1 How to listen to and follow instructions carefully.
- 1.2 How to plan own work.
- 1.3 The purpose of keeping other people informed about progress.
- 1.4 How to ask for help if needed.
- 1.5 The benefits of acknowledging and learning from own mistakes.
- 1.6 Guidelines, procedures and codes of practice that are relevant to own work.

2 Behave in a way that supports effective working

- 2.1 The purpose of setting achievable standards for own work.
- 2.2 The benefits of being ready to take on new challenges and adapt to change.
- 2.3 The purpose and benefits of treating others with honesty, respect and consideration.
- 2.4 Why the way to behave in the workplace is important.
- 2.5 Types of behaviour that show honesty, respect and considerateness and types of behaviour that show the reverse.

3 Improve own performance

- 3.1 The value and benefits of continuously improving own work.
- 3.2 The benefits of accepting feedback from others.
- 3.3 How learning and development can help to improve own work, benefit the organisation and further own career.
- 3.4 The main career progression routes available.
- 3.5 The learning and development opportunities that are available.

Unit 102

Support work procedures in a business environment (S102)

Level: 1

What is the unit about?

This unit is about supporting the delivery of sustainability, respecting diversity and protecting security and confidentiality in line with organisational requirements in a business environment.

Specific skills

- Communicating
- Interpersonal skills
- Reading
- Teamwork

Performance indicators

1 Support sustainability

- 1.1 Keep waste to a minimum.
- 1.2 Follow procedures for the recycling and disposal of hazardous materials.

2 Support diversity

- 2.1 Treat other people in a way that respects their background, abilities, values, customs and beliefs.
- 2.2 Learn from other people and use this learning to improve own way of working.
- 2.3 Follow the organisation's procedures and legal requirements in relation to discrimination legislation.

3 Maintain security and confidentiality

- 3.1 Keep property secure in a way that is consistent with organisational procedures and legal requirements.
- 3.2 Keep information secure and confidential in a way that is consistent with organisational procedures and legal requirements.

Knowledge and understanding

1. Support sustainability

- 1.1 The purpose and benefits of keeping waste to a minimum.
- 1.2 The main types of waste that occur in a business administration environment and how to minimise waste.
- 1.3 The procedures to follow for the recycling and disposal of hazardous materials and the purpose and benefits of following procedures.

2. Support diversity

- 2.1 What is meant by diversity.
- 2.2 Why diversity should be valued in the workplace.
- 2.3 How to treat other people in a way that respects their abilities, background, values, customs and beliefs.
- 2.4 The ways in which it is possible to learn from others.

3. Maintain security and confidentiality

- 3.1 The purpose of maintaining security and confidentiality.
- 3.2 The legal and organisational requirements in relation to security and confidentiality.

Unit 103

Contribute to solving business problems (S103)

Level: 1

What is the unit about?

This unit is about contributing towards identifying and solving business problems.

Specific skills

- Communicating
- Working with others
- Organising
- Planning
- Problem-solving

Performance indicators

- 1.1 Check understanding of the business problem.
- 1.2 Discuss the business problem with others.
- 1.3 Seek advice on how to deal with the business problem.
- 1.4 Agree how to recognise when the business problem has been solved.
- 1.5 Use support and feedback from others to help solve the business problem.

Knowledge and understanding

- 1.1 How to identify a business problem.
- 1.2 Different ways to solve business problems.
- 1.3 Different ways of recognising when a business problem has been solved.
- 1.4 Reasons for using support and feedback from others.

Unit 104

Contribute to working with others in a business environment (S104)

Level: 1

What is the unit about?

This unit is about contributing to working with other people to present a positive image of the organisation and working towards achieving organisational goals and objectives in a business environment.

Specific skills

- Communicating
- Problem-solving
- Managing time
- Working with others
- Negotiating
- Planning

Performance indicators

- 1.1 Work in a way that supports the team's objectives.
- 1.2 Follow systems and procedures that are relevant to the job role.
- 1.3 Work with people in a way that presents a positive image of the organisation.
- 1.4 Seek guidance from others when unsure about own work.
- 1.5 Communicate with other people.
- 1.6 Provide support to other team members as appropriate to the job role.
- 1.7 Show respect for others.
- 1.8 Produce quality work on time.
- 1.9 Refer problems and disagreements to an appropriate colleague.
- 1.10 Use feedback from others to improve own work.

Knowledge and understanding

- 1.1 Own responsibilities at work.
- 1.2 The purpose of working with other people to achieve goals and objectives.
- 1.3 How own job role fits into the organisation's structure.
- 1.4 The organisational systems and procedures that are relevant to own job role.
- 1.5 Who to consult if unsure about policies, objectives, systems and values.
- 1.6 Different methods of communication and when to use them.
- 1.7 When it is essential to communicate with others within the team.
- 1.8 The situations in which team members might need support and how to provide this.
- 1.9 The purpose of respecting others.
- 1.10 The purpose of quality measures.
- 1.11 The types of problems and disagreements that occur when working with others and how to refer them.
- 1.12 How to make use of feedback to improve individual work and the work of the team as a whole.

Unit 105

Understand how to communicate in a business environment (S105)

Level: 1

What is the unit about?

This unit is about understanding how to communicate both verbally and in writing in a business environment.

Specific skills

- Communicating
- Organising
- Planning
- Reflecting

Performance indicators**1. Plan communication**

- 1.1 Identify the purpose of the communication.
- 1.2 Decide which method of communication to use.

2. Communicate in writing

- 2.1 Format information clearly and accurately.
- 2.2 Use language that suits the purpose of the communication.
- 2.3 Use accurate grammar, punctuation and spelling to make sure meaning is clear.
- 2.4 Check work and make any necessary amendments.
- 2.5 Produce the communication to meet deadlines recognising the difference between what is important and what is urgent.
- 2.6 Keep a file copy of all communication.

3. Communicate verbally

- 3.1 Present information clearly to others.
- 3.2 Make contributions to discussions.
- 3.3 Listen actively to information other people are communicating.
- 3.4 Ask relevant questions to clarify anything not understood.

4. After communication

- 4.1 Seek feedback on whether the communication achieved its purpose.
- 4.2 Reflect on the outcomes of the communication and identify ways to develop communication skills further.

Knowledge and understanding**1. Plan communication**

- 1.1 The reasons for identifying the purpose of communication.
- 1.2 Methods of communication and when to use them.

2. Communicate in writing

- 2.1 How to use language that suits the purpose of the communication.
- 2.2 How to format information clearly and accurately.
- 2.3 How to use grammar, punctuation and spelling accurately.
- 2.4 The principles of plain English.
- 2.5 The reasons for checking work.
- 2.6 How to recognise when work is urgent or important.
- 2.7 The organisation's procedures for filing communications.

3. Communicate verbally

- 3.1 How to present information and ideas clearly.
- 3.2 How to contribute to discussions.
- 3.3 Methods of active listening.

4. After communication

- 4.1 How to seek feedback on whether the communication achieved its purpose.
- 4.2 The value of reflecting on the outcomes of the communication and of identifying ways to develop communication skills further.

Level: 1

What is the unit about?

This unit is about making, receiving or transferring telephone calls in line with organisational requirements.

Specific skills

- Communicating
- Personal presentation
- Questioning
- Summarising

Performance indicators**1. Make calls**

- 1.1 Identify the purpose of the call.
- 1.2 Obtain the name and numbers of the person to be contacted.
- 1.3 Make contact with the person.
- 1.4 Communicate information to achieve the purpose of the call.
- 1.5 Summarise the outcomes of the conversation before ending the call.
- 1.6 Report telephone system faults to the appropriate colleague.

2. Receive calls

- 2.1 Answer the telephone according to organisational procedures.
- 2.2 Project a positive image of self and the organisation.
- 2.3 Identify the caller, where they are calling from and what they need.
- 2.4 Provide accurate and up-to-date information to callers while protecting confidentiality and security.
- 2.5 Take and pass on messages according to caller's needs.
- 2.6 Deal with problems in handling calls, referring to the appropriate person where necessary.

3. Transfer calls

- 3.1 Transfer calls promptly, when appropriate.
- 3.2 Explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller.
- 3.3 When callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures.

Knowledge and understanding

- 1.1 The different features of telephone systems and how to use them.
- 1.2 Organisation structures and communication channels within an organisation.
- 1.3 How to follow organisational procedures when making and receiving calls.
- 1.4 The purpose of projecting a positive image of self and the organisation.
- 1.5 The purpose and value of confidentiality and security when dealing with callers.
- 1.6 The types of information that could affect confidentiality and security and how to handle these.
- 1.7 The purpose of summarising outcomes of a telephone conversation before ending the call.
- 1.8 How to identify problems and who to refer them to.
- 1.9 How to report telephone system faults.

2. Make calls

- 2.1 The reasons for identifying the purpose of a call before making it.
- 2.2 The different methods that can be used to obtain the names and numbers of people that need to be contacted.
- 2.3 How to use telephone systems to make contact with people inside and outside the organisation.

3. Receive calls

- 3.1 How to identify the caller and their needs.
- 3.2 The purpose of giving accurate and up-to-date information to callers.

4. Transfer calls

- 4.1 The information to be given when transferring calls, taking or leaving messages.
- 4.2 How to identify the appropriate person to whom a call is transferred.

Unit 107

Assist in handling mail (S107)

Level: 1

What is the unit about?

This unit is about assisting with checking, sorting, distributing and despatching incoming or outgoing mail or packages.

Specific skills

- Checking
- Decision-making
- Prioritising
- Problem-solving

Performance indicators**1. Incoming Mail**

- 1.1 Check incoming mail or packages.
- 1.2 Sort incoming mail or packages and dispose of unwanted 'junk' mail.
- 1.3 Identify and/or report suspicious or damaged items.
- 1.4 Distribute incoming mail or packages.
- 1.5 Refer any problems to the appropriate colleague.

2. Outgoing Mail

- 2.1 Collect and sort outgoing mail or packages.
- 2.2 Dispatch outgoing mail or packages on time.
- 2.3 Refer any problems to the appropriate colleague.

Knowledge and understanding

- 1.1 The purpose of distributing and dispatching mail to the correct recipient and within agreed timescales.
- 1.2 The names, roles and locations of individuals and teams to whom mail is distributed.
- 1.3 The organisational procedures for dealing with different types of mail or packages.
- 1.4 The types of problems that may occur with incoming and outgoing mail or packages.
- 1.5 When to refer problems and to whom problems should be referred.

Unit 109

Prepare text from notes using touch typing (20 wpm) (S109)

Level: 1

What is the unit about?

This unit is about presenting accurate and correct text in an agreed format, from notes; touch typing at a speed of 20 words per minute.

Specific skills

- Checking
- Using technology
- Listening
- Managing time
- Questioning

Unit 109

Prepare text from notes using touch typing (20 wpm) (S109)

Performance indicators

- 1.1 Input the text using touch typing to 20 words per minute.
- 1.2 Format the text, making efficient use of available technology.
- 1.3 Check content for accuracy, editing and correcting text.
- 1.4 Clarify text requirements when necessary.
- 1.5 Store the text and the original notes safely and securely in approved locations.
- 1.6 Present the text in the required format within agreed deadlines.

Knowledge and understanding

- 1.1 The different types of documents that may be produced from notes and the formats they should follow.
- 1.2 The difference between producing text from own notes and producing text from others' notes.
- 1.3 The benefits of agreeing the purpose, format and deadline for the text.
- 1.4 The purpose of accuracy when preparing text.
- 1.5 How to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose of doing this.
- 1.6 The purpose of storing text safely and securely and how to do so.
- 1.7 The purpose of confidentiality and data protection.
- 1.8 The purpose and benefits of meeting deadlines.

Unit 110

Use a filing system (S110)

Level: 1

What is the unit about?

This unit is about using different information systems to store and retrieve information.

Specific skills

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

Performance indicators**1. Processing information**

- 1.1 Collect required information.
- 1.2 Follow agreed procedures and legislation to maintain security and confidentiality.
- 1.3 Store required information in approved locations to the required standard.
- 1.4 Update information as required.

2. Retrieve information

- 2.1 Confirm information for retrieval.
- 2.2 Comply with procedures and legislation for accessing an information system.
- 2.3 Locate and retrieve required information.
- 2.4 Refer any problems with information systems to the appropriate colleague.

Knowledge and understanding

- 1.1 The purpose of storing and retrieving required information.
- 1.2 The different information systems and their main features.
- 1.3 Legal and organisational requirements covering the security and confidentiality of information.
- 1.4 The purpose of confirming the information to be collected, stored and retrieved.
- 1.5 The methods used to collect required information.
- 1.6 The procedures to be followed to access information systems.
- 1.7 The types of problems that occur with information systems and who to report them to.

Level: 1

What is the unit about?

This unit is about archiving and retrieving information in line with organisational requirements.

Specific skills

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

Performance indicators

- 1.1 Confirm the information to be archived.
- 1.2 Follow organisational procedures and legislation for archiving information.
- 1.3 Follow instructions to archive information correctly and within agreed timescales.
- 1.4 Maintain a record of archived information.
- 1.5 Follow instructions to retrieve archived records on request.
- 1.6 Refer problems to the appropriate colleague, if required.

Knowledge and understanding

- 1.1 The purpose of archiving required information.
- 1.2 Legal and organisational requirements covering security and confidentiality of information to be archived.
- 1.3 The purpose of confirming information to be archived.
- 1.4 The procedures to be followed to access archive information systems.
- 1.5 The purpose of recording archived information.
- 1.6 The purpose of archiving information within agreed timescales.
- 1.7 Procedures for retrieving archived information.
- 1.8 The problems that occur with archive systems and who to report them to.

Unit 112

Use occupational and safety guidelines when using keyboards (S112)

Level: 1

What is the unit about?

This unit is about positioning the relevant parts of the body safely when typing at a workstation.

Specific skills

- Communicating
- Planning
- Problem-solving

Unit 112

Use occupational and safety guidelines when using keyboards (S112)

Performance indicators

- 1.1 Follow the concepts of ergonomic practice related to typing.
- 1.2 Follow relevant occupational health and safety guidelines.
- 1.3 Position relevant parts of the body in relation to the size, slope and type of keyboard being used.
- 1.4 Position relevant parts of the body in relation to the size and shape of the workstation being used.
- 1.5 Maintain and care for the workstation being used for typing operations.

Unit 112

Use occupational and safety guidelines when using keyboards (S112)

Knowledge and understanding

- 1.1 Concepts of ergonomic practice relating to typing in accordance with occupational health and safety guidelines.
- 1.2 Organisational occupational health and safety guidelines.
- 1.3 How to position fingers, wrists, forearms and back in relation to the size, slope and type of keyboard.
- 1.4 How to position fingers, wrists, forearms and back in relation to the size and shape of the workstation being used.
- 1.5 Workstation care and maintenance in relation to typing operations.

Level: 1

What is the unit about?

This unit is about understanding and using a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

Specific skills

- Communicating
- Presenting information
- Using technology

Performance indicators**1. Use e-mail software tools and techniques to compose and send messages**

- 1.1 Use software tools to compose and format e-mail messages.
- 1.2 Attach files to e-mail messages.
- 1.3 Send e-mail messages.
- 1.4 Use an address book to store and retrieve contact information.

2. Manage incoming email effectively

- 2.1 Follow guidelines and procedures for using e-mail.
- 2.2 Read and respond to e-mail messages appropriately.
- 2.3 Organise and store e-mail messages.
- 2.4 Respond appropriately to common email problems.

Knowledge and understanding

- 1.1 Identify how to stay safe and respect others when using e-mail.
- 1.2 Identify when and how to respond to e-mail messages.
- 1.3 Identify what messages to delete and when to do so.

Level: 1

What is the unit about?

This unit is about using a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

Specific skills

- Checking
- Communicating
- Presenting information
- Using technology

Performance indicators

- 1. Enter, edit and combine text and other information accurately within word processing documents**
 - 1.1 Use keyboard or other input method to enter or insert text and other information.
 - 1.2 Combine information of different types or from different sources into a document.
 - 1.3 Enter information into existing tables, forms and templates.
 - 1.4 Use editing tools to amend document content.
 - 1.5 Store and retrieve document files effectively, in line with local guidelines and conventions where available.

- 2. Structure information within word processing documents**
 - 2.1 Create and modify tables to organise tabular or numeric information.
 - 2.2 Select and apply heading styles to text.

- 3. Use word processing software tools to format and present documents**
 - 3.1 Select and use appropriate techniques to format characters and paragraphs.
 - 3.2 Select and use appropriate page layout to present and print documents.
 - 3.3 Check documents meet needs, using IT tools and making corrections as necessary.

Knowledge and understanding

- 1.1 Identify what types of information are needed in documents.
- 1.2 Identify what templates are available and when to use them.
- 1.3 Identify what formatting to use to enhance presentation of the document.

Level: 2

What is the unit about?

This unit is about presenting accurate and correct text in an agreed format from notes.

Specific skills

- Checking
- Questioning
- Keyboarding skills
- Using technology
- Listening
- Managing time

Performance indicators

- 1.1 Agree the purpose, format and deadlines for the transcription.
- 1.2 Input the text using keyboarding skills.
- 1.3 Format the text, making efficient use of available technology.
- 1.4 Check content for accuracy, editing and correcting text.
- 1.5 Clarify text requirements when necessary.
- 1.6 Store the text and the original notes safely and securely in approved locations.
- 1.7 Present the text in the required format within agreed deadlines.

Knowledge and understanding

- 1.1 The different types of documents that may be produced from notes and the formats they should follow.
- 1.2 The difference between producing text from own notes and producing text from others' notes.
- 1.3 The benefits of agreeing the purpose, format and deadline for the text.
- 1.4 The purpose of accuracy when preparing text.
- 1.5 How to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this.
- 1.6 The purpose of storing text safely and securely and how to do so.
- 1.7 The purpose of confidentiality and data protection.
- 1.8 The purpose and benefits of meeting deadlines.

Unit 220

Use office equipment (S220)

Level: 2

What is the unit about?

This unit is about using a range of office equipment (such as photocopiers, faxes, binders, laminators, printers or PCs) applying the necessary standards of health and safety and operating practice.

Specific skills

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

Performance indicators

- 1.1 Locate and select the equipment and resources needed for the task.
- 1.2 Follow the manufacturer's and organisational operating instructions and health and safety requirements for different equipment.
- 1.3 Waste as few resources as possible.
- 1.4 Keep the equipment clean and hygienic.
- 1.5 Deal with equipment and resource problems according to manufacturer's and organisational procedures.
- 1.6 Report problems you cannot deal with personally to the appropriate colleague.
- 1.7 Make sure the final work product meets the agreed requirements.
- 1.8 Produce the work product within agreed timescales.
- 1.9 Make sure the equipment, resources and work area are ready for the next user.

Knowledge and understanding

- 1.1 The different types of office equipment, their features and what they can be used for.
- 1.2 How to choose equipment and resources that are appropriate for the task.
- 1.3 The reasons for following manufacturers' and organisational instructions when operating equipment.
- 1.4 How to use different types of office equipment safely.
- 1.5 The reasons for keeping waste to a minimum and how to do so.
- 1.6 The reasons for keeping equipment clean and hygienic.
- 1.7 The reasons for following manufacturers' instructions and organisational procedures when dealing with equipment faults.
- 1.8 The types of equipment and resource faults you are likely to experience and the correct way of dealing with these.
- 1.9 The purpose of meeting work standards and deadlines.
- 1.10 The purpose of leaving equipment, resources and work area ready for the next user to agreed requirements.

Unit 223

Support the organisation of business travel or accommodation (S223)

Level: 2

What is the unit about?

This unit is about supporting the organisation of business travel or accommodation arrangements.

Specific skills

- Communicating
- Managing time
- Problem-solving
- Checking
- Negotiating
- Researching
- Decision-making
- Organising
- Evaluating
- Planning

Performance indicators

- 1.1 Confirm business travel or accommodation and budget requirements from the organiser.
- 1.2 Check draft itinerary and schedule with the traveller.
- 1.3 Research and book business travel arrangements or accommodation as agreed, obtaining best value for money.
- 1.4 Obtain and collate documents and information for business travel or accommodation.
- 1.5 Maintain records of business travel or accommodation and store any confidential information securely, including financial records.
- 1.6 Follow arrangements for payment facilities for business travel or accommodation.
- 1.7 Follow the correct procedures when there are problems with business travel or accommodation arrangements.
- 1.8 Provide the traveller with an itinerary, documents and information in good time.
- 1.9 Confirm with the organiser or traveller(s) that itinerary, documents and information meet requirements.

Knowledge and understanding

- 1.1 The purpose of confirming the brief and budget for travel or accommodation.
- 1.2 How to support the organisation of business travel or accommodation to meet expectations.
- 1.3 The main types of business travel or accommodation arrangements that may need to be made and the procedures to follow.
- 1.4 The sources of information and facilities that are used to make business travel or accommodation arrangements.
- 1.5 How to obtain best value for money when making business travel or accommodation arrangements.
- 1.6 How to keep records of business travel or accommodation arrangements.
- 1.7 The documents and information to provide to the person who is travelling and how to obtain these.
- 1.8 The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems.

Unit 250

Meet and welcome visitors (S250)

Level: 2

What is the unit about?

This unit is about meeting and welcoming visitors and ensuring visitors' needs are met, while presenting a positive image of the organisation.

Specific skills

- Communicating
- Personal presentation
- Decision-making
- Problem-solving
- Interpersonal skills
- Listening

Performance indicators

- 1.1 Meet and greet visitors promptly, treating them politely and making them feel welcome.
- 1.2 Identify visitors and the reason for their visit.
- 1.3 Use the organisation's systems to receive and record visitors, as appropriate.
- 1.4 Make sure visitors' needs are met.
- 1.5 Explain to visitors reasons for any delay in dealing with them, and keep them informed of developments.
- 1.6 Present a positive image of yourself and your organisation.
- 1.7 Follow organisational, health, safety and security procedures.
- 1.8 Inform relevant people about visitors' arrival promptly.
- 1.9 Deal with any problems that may occur, or refer these to an appropriate colleague.

Knowledge and understanding

- 1.1 The purpose of dealing with visitors promptly and making them feel welcome.
- 1.2 The organisational procedures for receiving and dealing with visitors, including security.
- 1.3 The typical range of visitors to the premises and their needs.
- 1.4 The purpose of presenting a positive image of self and the organisation.
- 1.5 How to respond to any individual needs the visitor may have (for example, accessibility).
- 1.6 The purpose of health and safety and security procedures and own responsibilities for health, safety and security.
- 1.7 Organisation structures and communication channels within the organisation.
- 1.8 The purpose and value of communication with visitors.
- 1.9 How to deal with challenging behaviour from visitors calmly and in line with organisational procedures.
- 1.10 The types of problems that may occur with visitors, including conflict and aggression, and how to deal with these.

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF):** general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events:** dates and information on the latest Centre events
- **Online assessment:** information on how to register for GOLA/e-volve assessments.

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www.cityandguilds.com

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLA/e-volve, Navigation, User/menu option, Problems

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Employer

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