



Business and Administration

National Occupational Standards (NOS)

April 2021

Unit 3 Cherry Hall Road
North Kettering Business Park
Kettering, NN14 1UE
T: 01536 739 189
E: skills@instructus.org
www.instructus-skills.org

URN	NOS Title
INSBA001	Support implementation of change in a business environment
INSBA002	Contribute to innovation in a business environment
INSBA003	Develop self and improve own performance in a business environment
INSBA004	Develop and coordinate organisational performance
INSBA005	Inform and support organisational decision-making
INSBA006	Support organisational projects
INSBA007	Prepare and coordinate operational plans and procedures
INSBA008	Undertake and support work practices in a business environment
INSBA009	Collaborate and provide support in a business environment
INSBA010	Deliver and evaluate customer service
INSBA011	Support negotiations in a business environment
INSBA012	Carry out and maintain administrative services
INSBA013	Design and produce documents in a business environment
INSBA014	Communicate in a business environment
INSBA015	Develop and deliver a presentation
INSBA016	Organise and coordinate corporate events
INSBA017	Organise and coordinate business travel and accommodation
INSBA018	Organise and run meetings
INSBA019	Prepare and maintain contracts
INSBA020	Support and maintain information systems
INSBA021	Carry out and analyse research
INSBA022	Store, share, retrieve and archive information
INSBA023	Manage office facilities, resources and equipment
INSBA024	Use office equipment in accordance with occupational regulations and safety guidelines

Overview

This standard is about supporting implementation of change in a business environment. It includes collecting information, assisting the change process and communication strategy, identifying support mechanisms for yourself and colleagues. The standard addresses the strategies for dealing with change as part of your role, that include identifying, analysing, evaluating and prioritising trends and events affecting the way the organisation operates. The standard covers taking account of legal, regulatory and ethical requirements for your area of responsibilities and seeking specialist advice, where appropriate. It is for professionals in business administration roles who support implementation of change, but who may not be accountable for planning or managing the process.

Performance criteria

You must be able to:

1. prepare for change by collecting information about strengths and weaknesses of your area of work
2. assist the change process within own area of work
3. contribute to plans for change
4. ensure the relevant methods are in place to identify the internal and external organisational factors
5. identify and prioritise internal and external factors for their relevance to your organisation
6. analyse and evaluate trends and events for their implications for your organisation
7. identify, evaluate and prioritise the relevant legal and regulatory requirements
8. seek specialist advice on interpretations of relevant legal and regulatory requirements, where required
9. communicate information to the relevant colleagues and team members to inform decision-making
10. explain the need to change to your colleagues
11. assist with communication strategy to create readiness for change
12. adapt to change within specified timescales
13. identify support mechanisms for yourself and colleagues during the change process
14. agree the actions required with decision-makers in relation to trends and events affecting change
15. support colleagues during change and sustain the process
16. ask questions of the change process when unsure
17. contribute to the evaluation of change
18. ensure any actions meet the legal, regulatory and ethical requirements for your area of responsibilities

Knowledge and understanding

You need to know and understand:

1. the nature of internal and external organisational factors
2. your organisation's mission and objectives
3. your organisation's strategies and policies
4. how to prepare for change in your area of work
5. the reasons for change and the pace of change in organisations
6. the psychological impact of change on team members in the workplace
7. your own role in facilitating change at work
8. how to adapt to change in own work role
9. the value of seeing change as an opportunity to the business, the organisation, the team and self
10. the types of support mechanisms for yourself and colleagues during the change process
11. how to put change at work into perspective
12. the strategies to cope with change or to learn how to control the way change affects own area of work
13. how to evaluate the effect of change in the workplace
14. the methods of monitoring and analysing the internal and external organisation factors
15. the nature and types of external influences which impact on your organisation
16. the relevant legal and regulatory requirements and ethical responsibilities relating to external influences which may affect organisational interests
17. the consequences of non-compliance with legal and regulatory requirements
18. the methods of communicating and presenting information with colleagues, team members and decision-makers
19. the methods of agreement and actions to meet the legal, regulatory and ethical requirements for your area of responsibilities

Skills

1. adapting to change
2. analysing
3. communicating
4. listening
5. negotiating
6. prioritising
7. problem solving
8. questioning
9. reporting
10. researching

Support implementation of change in a business environment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA111, CFABAH114

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business, Administration and Law

Suite Business and Administration

Keywords Business; administration; environment; change

Overview

This standard is about contributing to innovation in a business environment. It includes generating, developing and evaluating ideas for innovation in a business environment. It also covers identifying and researching possible ways of improving working practices, products or services, evaluating the ideas and adapting them based on the feedback received.

It is for professionals in business administration roles who are involved in making contributions to innovation.

Performance criteria

You must be able to:

1. analyse the current working practices within the organisation
2. research and identify possible innovations of working methods, services or products
3. collate information to support the innovation with your own ideas
4. evaluate your ideas against the agreed criteria and organisational aims and objectives
5. identify the costs and benefits of your ideas and analyse their impact on working methods, services or products
6. carry out a risk analysis of your ideas
7. assess own ideas' competitiveness
8. question your own ideas and assumptions to develop concepts and propositions
9. evaluate the potential of your ideas with colleagues and team members, identifying the required improvements
10. communicate and promote your ideas to colleagues and team members
11. develop a formal proposal to influence the stakeholders and decision-makers
12. collate the feedback and review your ideas and working practices
13. improve your ideas and working practices from lessons learned

Knowledge and understanding

You need to know and understand:

1. the current working practices within the organisation
2. the range of working methods, services or products at your organisation
3. how to research possible improvements to support the innovation
4. the value of innovation and new solutions to the current issues
5. how to evaluate ideas, including cost, benefit and impact analysis
6. the methods of carrying out the risk analysis
7. how to assess the competitiveness of your ideas
8. how to question your ideas and assumptions to develop concepts and propositions
9. the relevant methods of evaluation of your ideas and how to implement improvements
10. how to communicate and promote your ideas and working practices
11. how to develop and document proposals
12. how to collate feedback to review your ideas and working practices
13. the value of reflection based on lessons learned

Contribute to innovation in a business environment

Skills

1. analysing
2. communicating
3. evaluating
4. negotiating
5. organising
6. persuading
7. planning
8. problem-solving
9. questioning
10. reviewing
11. risk analysis

Contribute to innovation in a business environment

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA112, CFABAA113
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; innovation

Overview

This standard is about developing self and improving own performance in a business environment. The standard covers planning the improvements, accepting plans and responsibility for own work and its delivery. It includes negotiating the work targets and resources required for meeting them, reflecting on and learning from any mistakes, setting targets for own performance and demonstrating commitment to meet them. Developing self is an important aspect of your performance as it addresses emotional intelligence, your wellbeing, mental health, balance between personal and professional life not only in an office-based environment, but working remotely, or from home.

This standard is built around three main areas:

1. Plan and be accountable for own work
2. Support the working practices
3. Develop self.

It is for professionals in business administration roles who develop selves and improve own performance in a business environment.

Performance criteria

You must be able to:

Plan and be accountable for own work

1. identify and agree the performance targets and the timescales for achievement
2. plan how to make the best use of time and identify the required resources
3. confirm the working methods and practices with your line management
4. keep your line management informed about the progress of your performance
5. follow the agreed procedures for dealing with problems or issues
6. take responsibility for your own work and accept responsibility for any mistakes
7. seek support and assistance from your colleagues or team members where required
8. meet your deadlines or renegotiate targets and plans
9. reflect on your performance and review it in accordance with lessons learnt
10. follow agreed guidelines, procedures and, where appropriate, codes of practice

Support the working practices

11. set the targets for own performance and demonstrate commitment to meet them
12. cope with pressure and overcome difficulties and setbacks
13. seek new challenges and take the initiative on them
14. adapt to change and support colleagues and team members during the process
15. treat colleagues and team members with honesty, respect and consideration
16. support colleagues and team members with work tasks

Develop self

17. seek the feedback from your colleagues and team members
18. collate the feedback received for evaluation of your own work
19. identify methods to improve your work, and test their effectiveness with working practice
20. update your plans for learning and improvement
21. review your progress with line management on a regular basis

-
22. identify your learning and development needs for your performance improvement
 23. develop and follow a learning plan that meets your needs
 24. review your performance through self-reflection when working towards achievement of your objectives
 25. use emotional intelligence to recognise and evaluate your own and your colleagues' strengths and weaknesses, feelings, opinions and judgements
 26. seek new sources of support and feedback, when necessary
 27. take actions to maintain your well-being, mental health, balance between your professional and personal life, when required

Knowledge and understanding

You need to know and understand: **Plan and be accountable for own work**

1. how to identify and agree the performance targets and the timescales for achievement
2. the planning and time management techniques
3. the scope of resources required meeting the performance targets
4. the working methods and practices within your role
5. how to keep track of the progress of your performance and why it is important to keep your line manager up-to-date on this
6. the agreed procedures for dealing with problems or issues
7. the importance of taking responsibility for any mistakes
8. how to seek support and assistance from your colleagues or team members
9. the relevant guidelines, procedures and codes of practice that are relevant to your work
10. the benefits and value of continuously improving your work

Support the working practices

11. the targets of own performance and the importance of meeting them
12. the purpose and value of being resilient when you experience pressure, difficulties and setbacks
13. the purpose and benefits of being assertive
14. the purpose and benefits of actively seeking new challenges and adapting to change
15. how to offer support to your colleagues and team members
16. the types of behaviour that show you are honest, respectful and considerate

Develop self

17. how to seek feedback from your colleagues and team members
18. the methods of collating the feedback to evaluate your work
19. the purpose and benefits of testing possible improvements to your work
20. how learning and development can help you to improve your work, benefit the organisation and further your career
21. how to develop a learning plan
22. why it is important to review your progress with line management

on a regular basis

23. the main career progression routes available to you
24. the self-reflection techniques for monitoring your performance
25. the importance of emotional intelligence
26. the sources of support and feedback, where required
27. your well-being, mental health, balance between your professional and personal life

Skills

1. analysing
2. communicating
3. collating feedback
4. decision making
5. organising
6. planning
7. presenting information
8. researching
9. problem solving
10. using technology

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA624, CFABAA625, CFABAA626, CFABAA627
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; personal performance

Overview

This standard is about developing and coordinating organisational performance. It includes identifying, prioritising and agreeing key performance factors, helping users to implement the procedures, evaluating the procedures and recommending changes. It also covers identifying, developing, implementing and evaluating improvements in corporate performance in accordance with legal and regulatory requirements.

The standard is for professionals in business administration roles who develop and coordinate organisational performance.

Performance criteria

You must be able to:

1. collate and identify the relevant organisational performance information
2. identify and prioritise the organisational performance indicators against corporate objectives, strategies and policies
3. agree qualitative and quantitative organisational performance indicators and measures
4. analyse and interpret opportunities for improving the organisational performance
5. identify and recommend the organisational performance monitoring systems and procedures
6. agree the implementation of organisational performance monitoring systems and procedures
7. analyse the results of organisational performance monitoring systems and procedures
8. evaluate organisational performance monitoring systems and procedures
9. recommend changes to organisational performance with relevant decision-makers
10. confirm the changes to be carried out within agreed timescales and deadlines
11. support organisational decision-making through presenting and communicating the findings and results
12. help colleagues and team members to adopt the changes to organisational performance
13. monitor and review the impact and effectiveness of changes to support future decision-making
14. collate lessons learned from your experience to inform further processes and organisational practice improvement
15. apply relevant improvement theory and practice to your organisational processes
16. ensure the ethical responsibilities are met when recommending opportunities for improving organisational performance
17. follow the legal and regulatory requirements when analysing opportunities for improving organisational performance

Knowledge and understanding

You need to know and understand:

1. the methods of collating and identifying the relevant organisational performance information
2. the organisational objectives, strategies and policies
3. the types of organisational performance monitoring systems and performance indicators
4. how to develop organisational performance monitoring systems and procedures
5. the qualitative and quantitative organisational performance indicators and measures
6. how to analyse and interpret the validity of performance information
7. the organisational performance monitoring systems and procedures
8. the methods of implementing the organisational performance monitoring systems and procedures
9. how to analyse and evaluate the impact of organisational performance monitoring systems and procedures
10. the ways of presenting information to colleagues and team members to adopt the change and support decisions
11. the methods of communication with colleagues and decision-makers
12. how to monitor and review the impact and effectiveness of changes in corporate performance
13. why it is important to collate lessons learned from your experience
14. the relevant improvement theory and practice to your organisational processes
15. the legal and regulatory requirements relating to the monitoring of organisational objectives, strategies and policies
16. the ethical responsibilities relating to the monitoring of organisational objectives, strategies and policies
17. the consequences of non-compliance with legal and regulatory requirements relating to the monitoring of organisational objectives, strategies and policies

Develop and coordinate organisational performance

Skills

1. analysing
2. communicating
3. evaluating
4. negotiating
5. planning
6. prioritising
7. problem solving
8. researching
9. reporting

Develop and coordinate organisational performance

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAH121, CFABAH122, CFABAH123

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; organisational performance

Overview

This standard is about informing and supporting organisational decision-making. It includes researching the information, presenting it, engaging with colleagues involved in decision-making. It also covers advising the decision-makers, recording and communicating decisions made by the governance body and making sure the organisation's governance and decisions conform with legal, regulatory, organisational, environmental and ethical requirements.

It is for professionals in business administration roles who inform and support organisational decision-making.

Performance criteria

You must be able to: **Research and collate information to support the decision-making**

1. research information to support the decision-making process
2. collate information to develop the decision-making ideas and recommendations
3. participate in meetings and contribute to the decision-making discussions
4. provide collated information to support the decision-making
5. liaise with colleagues involved in the decision-making process
6. assess contributions made to the decision-making process
7. identify and agree criteria for making decisions
8. review information to support the decision-making
9. justify the decisions made by using evidence, arguments, questioning and assertiveness
10. evaluate the methods for monitoring the impact of decisions
11. use lessons learnt to improve the future decision-making

Promote and facilitate organisational governance

12. identify and confirm organisational governance responsibilities and ensure these are understood by relevant members of staff
13. provide information and advice to enable the decision-making
14. record and communicate the decisions made by the governance body
15. ensure the organisational governance and decisions conform with legal, regulatory, organisational, environmental and ethical requirements

Advise decision-makers on the organisational ethical and social responsibilities

16. confirm the organisational ethical and social responsibilities
17. assess and evaluate the implications of ethical and social responsibilities
18. communicate the relevant ethical and social standards to decision-makers
19. provide information and advice on relevant ethical and social standards to enable effective decision-making
20. ensure the organisational policies, procedures and decisions reflect on the ethical and social responsibilities

Knowledge and understanding

You need to know and understand: **Research and collate information to support the decision-making**

1. the sources of information in preparing to make the decisions
2. the criteria for making decisions
3. how to research and collate information to support the decision-making
4. how to contribute to meetings and discussions where decisions are being made
5. the ways of presenting information to promote debate and inform decisions
6. the methods of recording and communicating organisational information and decisions
7. how to communicate with colleagues and team members in decision-making process
8. how to review and evaluate the researched information
9. how to structure ideas, information and recommendations to maximise their impact
10. the methods for monitoring the impact of decisions
11. how to collate lessons learnt to improve the future decision-making

Promote and facilitate organisational governance

12. the scope, purpose and benefits of governance systems and procedures
13. the roles, responsibilities and significance of all parties concerned with governance, including its stakeholders
14. the procedures for conducting meetings and events associated with governance
15. the methods of recording organisational objectives and governance systems
16. the purpose and effects of meeting legal and regulatory requirements, environmental and ethical responsibilities relating to governance
17. the consequences of non-compliance with legal and regulatory requirements relating to governance
18. the purpose and effects of legal requirements and methods of handling confidential and sensitive information
19. the relevant codes of practice

20. the sources of information and networks relating to ethical and social responsibilities and the purpose of meeting these responsibilities
21. the organisational mission statement and objectives, strategies and policies
22. the purpose and effects of legal and regulatory requirements, and your own ethical responsibilities relating to the organisational ethical and social responsibilities
23. the consequences of non-compliance with legal and regulatory requirements relating to the organisation's ethical and social responsibilities

Advise decision-makers on the organisational ethical and social responsibilities

24. the key stages in the decision-making process
25. the contexts in which the decisions are being made
26. your role in supporting the decision-making
27. how to contribute to the decision-making process
28. how to be proactive and engage with colleagues during the decision-making
29. how to assess contributions made to the decision-making process and value inputs
30. how to review the decision-making process
31. how to use the evidence, arguments, questioning and assertiveness to justify decisions
32. the concept of collective responsibility and why it is important
33. how to evaluate ways to monitor the impact of decisions

Skills

1. analysing
2. communicating
3. evaluating
4. prioritising
5. problem solving
6. reporting
7. researching

Inform and support organisational decision-making

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAI131, CFABAG122, CFABAG121, CFABAI132

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; organisational decision-making

Overview

This standard is about supporting organisational projects. It covers support in the planning, implementation and monitoring of projects to achieve the outcomes. It includes communicating with all those involved in the projects, keeping records of project activities and providing progress reports.

It is for professionals in business administration roles who support organisational projects.

Performance criteria

You must be able to:

1. identify all stakeholders involved in the project
2. confirm the purpose of the project with all relevant stakeholders
3. confirm the project scope, timescale, aims and objectives
4. contribute to the preparation of a project specifications and plans
5. confirm the activities and resources required for the project
6. identify potential risks and contribute to the development of a contingency plan to mitigate these
7. implement and monitor the project to meet the agreed budget and timescales
8. communicate with all stakeholders involved in or affected by the project
9. identify any issues within your control and seek advice for those which are outside your competence and authority
10. keep records of all project activities in the agreed format
11. provide interim reports on project progress to the relevant stakeholders at the agreed stages
12. report project completion to all relevant stakeholders

Knowledge and understanding

You need to know and understand:

1. the difference between managing operations and managing projects
2. the relevant stakeholders involved in or affected by the project
3. the project's purpose, scope, timescale, costs, aims and objectives
4. how to estimate types of activities required and quantity of resources required for projects
5. the risks associated with the project and mitigation of these
6. the project-planning tools that are available to assist project planning and control
7. the different methods available to monitor projects
8. the different ways of communicating with stakeholders involved in or affected by a project to make sure it runs smoothly
9. the benefits of being flexible and adapting project plans when necessary
10. how to record project activities and the relevant formats for these
11. the interim and completion reporting

Support organisational projects

Skills

1. application of number
2. analysing
3. communicating
4. evaluating
5. managing time
6. monitoring
7. organising
8. managing resources
9. prioritising
10. problem solving
11. planning

Support organisational projects

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA151
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; projects

Overview

This standard is about preparing and monitoring operational plans and procedures. The standard covers the organisational policies and procedures and legal requirements including respecting diversity and protecting security and confidentiality. It includes identifying risks and contingencies, making sure that the best use is made of resources and that actions are co-ordinated in line with the plan. It is for administrators who have responsibility for the preparation, co-ordination and monitoring of operational plans and work procedures.

It is for professionals in business administration roles who prepare and coordinate operational plans and procedures.

Performance criteria

You must be able to:

1. develop plans to coordinate relevant operations to achieve identified outcomes
2. specify the actions to ensure the required resources are available for achieving the agreed outcomes
3. define a schedule for achieving outcomes in accordance with specific, measurable, achievable, realistic and time-bound (SMART) objectives to aid monitoring
4. ensure plans are in accordance with organisational priorities, objectives and constraints
5. share the plan with all relevant stakeholders and get their approval
6. identify risks and develop contingencies to ensure the outcomes are achieved
7. monitor and update plans regularly to reflect changes to the outcomes or objectives
8. check that relevant members of staff understand their roles and responsibilities within the operational plans
9. coordinate the activities to deliver operational plans
10. communicate changes in plans which affect work methods and activities where these are required
11. agree corrective actions if operations are not in accordance with plans
12. keep all records secure in accordance with organisational policies, procedures, legal and data protection requirements

Knowledge and understanding

You need to know and understand:

1. the limits of your authority when preparing and coordinating operational plans
2. the members of staff to be involved in the development of operational plans
3. the organisation's relevant priorities, objectives and constraints
4. how to identify risks and contingencies when planning operations
5. the purpose of setting specific, measurable, achievable, realistic and time-bound (SMART) objectives and how to do so
6. the benefits of clear communication when planning and coordinating operations
7. the legal and regulatory requirements in relation to operational plans
8. the range of planning techniques and tools
9. how to identify and prioritise outcomes for operational plans
10. how to identify the actions, resources and those responsible to achieve the agreed outcomes of operational plans
11. how to monitor the plan against the agreed outcomes and objectives
12. the benefits of continuously seeking opportunities for improvement
13. the purpose of maintaining security and confidentiality
14. the organisational policies, procedures, legal and data protection requirements in relation to security and confidentiality of information

Prepare and coordinate operational plans and procedures

Skills

1. communicating
2. interpersonal skills
3. reading
4. team working

Prepare and coordinate operational plans and procedures

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAF171, CFABAA1110

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; work procedures

Overview

This standard is about undertaking supporting work practices in a business environment. It includes supporting your organisation's purpose and values, assessing and managing risks, maintaining the security and confidentiality, also supporting diversity and sustainability. It is for business administration professionals in supervisory or managerial roles who have responsibility for undertaking and supporting work practices in a business environment.

Performance criteria

You must be able to:

Support your organisation's purpose and values

1. support your organisation's overall mission and team's objectives
2. identify your organisation's purpose, policies, procedures and values
3. put your organisation's values into practice in all aspects of your work
4. work with external organisations and stakeholders in a way that improves the image of your organisation
5. improve your working practices in accordance with organisation's objectives, policies, systems, procedures and values

Assess and manage risks

6. identify possible sources of risk
7. assess the levels of risks
8. monitor and mitigate risks
9. identify any potential risks and manage these when they occur
10. evaluate and your methods of assessing and managing risks

Maintain security and confidentiality

11. maintain the security and confidentiality of information in accordance with organisational procedures and current legislation about data protection and use of technologies
12. report any concerns about security and confidentiality to the relevant member of staff or agency

Support diversity

13. establish and maintain a working environment that values diversity and respects all members of staff within your organisation
14. work with colleagues and use their experience to improve your working practices and methods of communication
15. interact with colleagues in a professional manner that respects their background, abilities, values, customs and beliefs
16. uphold the rights of members of staff who are different from you
17. follow your organisation's procedures and legal requirements in relation to equality legislation

Support sustainability

18. establish and maintain procedures for waste management
19. keep waste to a minimum and follow procedures for the recycling and disposal of waste materials

-
20. follow relevant procedures for maintenance of equipment
 21. continuously review working methods, including use of technology, and ways of improving efficiency
 22. identify equipment and materials that provide best value for money
 23. support colleagues to maximise their performance and value to the organisation
 24. establish and maintain procedures for the maintenance of equipment
 25. improve your working methods and the use of technology to support sustainability

Knowledge and understanding

You need to know and understand: **Support your organisation's purpose and values**

1. your organisation's mission and team's objectives
2. your organisation's purpose, policies, procedures and values
3. the remit of your work responsibilities and authority
4. the working practices with external organisations and stakeholders
5. how improve your working practices in accordance with organisation's goals and objectives

Assess and manage risks

6. the sources of risks in the work that you do
7. how to assess and monitor risks
8. the risk monitoring and mitigation methods
9. the importance of reviewing and evaluating how to identify risks

Maintain security and confidentiality

10. the purpose and benefits of maintaining security and confidentiality
11. your organisational procedures and current legislation about data protection and use of technologies
12. how to report any concerns about security and confidentiality to the relevant member of staff or agency

Support diversity

13. what is meant by diversity and why it should be valued
14. the working environment that promotes diversity and respects all members of staff within your organisation
15. the purpose and benefits of working with colleagues and using their experience to improve your working practices and methods of communication
16. the methods of interaction with respect to colleagues' their background, abilities, values, customs and beliefs
17. the advantages of supporting diversity within your organisation
18. how to ensure the working environment is supportive of diversity and makes best use of the talents of all those involved
19. how to uphold the rights of members of staff
20. the relevant legislation in support of equality and diversity in a working environment

Support sustainability

21. the main causes of waste in a business administration environment and how to minimise these
22. the social and legal requirements for recycling and disposal of waste and the organisational procedures in place to support these
23. how regular maintenance of equipment can help to minimise waste and the procedures you should put in place
24. how to use technology to work help improve working practices
25. how to engage all stakeholders in continuously improving working methods and the use of technology to achieve maximum efficiency
26. how to select sources of materials and equipment that provide best value for money
27. the purpose and benefits of considering issues of corporate social responsibility when selecting suppliers
28. your working methods and the use of technology to support sustainability

Skills

1. communicating
2. interpersonal skills
3. monitoring
4. planning
5. problem solving
6. reading
7. team working
8. working with other members of staff

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAF172, CFABAF173, CFABAF174
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; diversity, sustainability, risk assessment, confidentiality

Overview

This standard is about collaborating and providing support in a business environment. It covers working collaboratively with other members of staff to achieve the organisational goals and objectives. It includes supporting team members, sharing work goals, objectives, seeking feedback and working in a way that recognises the strengths or weaknesses of your colleagues and other members of staff, whilst also presenting and promoting a professional image of your organisation. This standard is also addressing planning, solving and evaluating business problems.

It is for professionals in business administration roles who collaborate and provide support in a business environment.

Collaborate and provide support in a business environment

Performance criteria

You must be able to:

1. work in a way that supports your organisation's mission and your team's objectives
2. put your organisation's values into your working practices
3. welcome opportunities to work with other colleagues to achieve set outcomes
4. follow organisational policies and procedures relevant to your job
5. work with your colleagues and other members of staff to maintain a professional image of your organisation
6. share work goals and plan work objectives with your colleagues and other members of staff
7. seek guidance from colleagues and other members of staff, when required
8. contribute to improving organisational objectives, policies, procedures and values
9. work with external organisations and stakeholders in a way that promotes a professional image of your organisation
10. provide support to other team members as appropriate
11. work in a way that recognises the strengths or weaknesses of your colleagues and members of staff
12. communicate with colleagues, other members of staff and stakeholders
13. refer problems and disagreements to an appropriate member of staff
14. recognise when a business problem exists
15. analyse the business problem, collating additional information as necessary
16. discuss the business problem with colleagues or senior members of staff
17. agree an approach to solve the business problem
18. seek feedback from colleagues and other members of staff to improve own work
19. share feedback for identification of improvements or on the achievement of objectives

Knowledge and understanding

You need to know and understand:

1. the remit of your role and your responsibilities at work
2. how to work in a way that supports your organisation's overall mission and your team's objectives
3. how your role fits into the organisation's structure and contributes to its operations
4. how to work with colleagues and other members of staff to achieve set outcomes
5. the purpose of working with colleagues and other members of staff to achieve goals and objectives
6. the policies, procedures and values of the organisation that are relevant to own job role
7. how to put your organisation's values into your working practice
8. who to consult about organisational policies, objectives and values
9. why working with colleagues and other members of staff can achieve set outcomes
10. the purpose of sharing work goals and plans when working with colleagues and other members of staff
11. how to contribute to improving objectives, policies, procedures and values
12. the methods of communication with colleagues, other members of staff and stakeholders
13. how to recognise when a business problem exists
14. the methods of analysis of a business problem and additional information to support it
15. the resources needed to solve business problems
16. how to work in a way that recognises the strengths or weaknesses of colleagues and other members of staff
17. how to work with external organisations and stakeholders in a way that promotes a professional image of your organisation
18. the types of issues and disagreements that can occur when working with others and how to resolve them
19. the purpose of giving and receiving constructive feedback
20. how to make use of feedback to improve your work and the work of your colleagues and other members of staff

Collaborate and provide support in a business environment

Skills

1. communicating
2. managing time
3. negotiating
4. planning
5. problem solving
6. resolving disagreement
7. team working
8. working with others

Collaborate and provide support in a business environment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAG1210, CFABAG1211, CFABAG129

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; team work

Overview

This standard is about delivering and evaluating customer service. The customers may be both internal and external to your organisation. It includes identifying customer needs and expectations, providing services to agreed timescales and quality standards and taking action to improve services based on customers' feedback.

It is for professionals in business administration roles who deliver and evaluate customer service.

Performance criteria

You must be able to:

Identify customer needs and expectations

1. build working relationships with internal and external customers
2. identify and confirm customer needs
3. agree timescales and quality standards with customers
4. manage expectations of all customers to make sure they are met

Deliver customer service

5. provide services to agreed timescales and quality standards
6. follow the organisational procedures if agreed timescales are not achieved
7. check customer needs and expectations are met
8. follow the correct procedures to handle complaints in a professional manner and within set timescales

Monitor and evaluate customer services

9. obtain and record customer feedback
10. analyse and evaluate customer feedback
11. take action to improve service to customers
12. follow the relevant legal and data protection legislation in relation to delivering customer service and information handling

Knowledge and understanding

You need to know and understand:

1. the range of products and services offered by your organisation to internal and external customers
2. the principles of customer service
3. the purpose and benefits of delivering customer service that meets or exceeds and customer expectations
4. how to build working relationships with internal and external customers
5. how to manage and meet customer expectations
6. the types of quality standards appropriate to own responsibilities
7. how to meet timescales and quality standards with internal and external customers
8. how to monitor internal and external customers satisfaction
9. the types of problems that internal and external customers may experience and how to process and resolve or refer them
10. the relevant procedures to follow when handling complaints
11. the techniques for collecting and analysing internal and external customer feedback
12. the purpose and benefits of continuous improvement
13. the relevant legal and data protection legislation in relation to delivering customer service and information handling

Deliver and evaluate customer service

Skills

1. evaluating
2. monitoring
3. problem solving
4. questioning
5. listening
6. negotiating

Deliver and evaluate customer service

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAC121
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; customer service

Overview

This standard is about supporting negotiations in a business environment. It covers contributing to negotiations with third parties to achieve planned objectives, preparing a negotiating brief, preparing proposals which meet the organisation's objectives and those of the third party and keeping accurate records of the outcomes of the negotiation. It involves identifying and prioritising objectives and any compromise positions prior to the negotiation, suggesting solutions to overcome problems and ensuring an agreement is reached that satisfies all parties involved, where possible.

It is for business administration professionals who support negotiations in a business environment.

Performance criteria

You must be able to:

1. prepare a negotiation brief for all relevant matters
2. identify and prioritise objectives and any compromise positions before negotiations begin
3. identify the objectives the other negotiator(s) might be trying to achieve
4. research and assess the strengths of negotiating position of other negotiator(s), prior to negotiations taking place
5. identify any potential problems in negotiations and suggest solutions to overcome them
6. ensure everyone involved in the negotiations is fully briefed and prepared prior to negotiations taking place
7. support negotiations in accordance with commercial and ethical frameworks
8. prepare proposals which meet set objectives for all parties involved
9. clarify everyone's understanding and respond to their queries and objections
10. consult with senior decision-makers when matters arise which require a higher level of authority to agree
11. ensure there is an agreement to the mutual satisfaction of all parties involved in the negotiations, where possible
12. ensure the negotiations are completed in a way which creates goodwill and promotes a professional image of the organisation
13. maintain records of the negotiations and outcomes and agree them with all parties involved
14. collate and analyse the lessons learnt when negotiations have not been successful
15. review your negotiation techniques on a regular basis to identify and action improvements

Knowledge and understanding

You need to know and understand:

1. the negotiation strategies and techniques
2. the process of negotiation in a business environment
3. the commercial and ethical frameworks relevant to negotiations
4. the roles and levels of responsibility of work colleagues prior to negotiations
5. the benefits of having set objectives and preparing compromise positions
6. the roles and levels of responsibility of work colleagues during the negotiation process
7. the differences in culture that might impact on the negotiations
8. the purpose and benefits of being flexible during negotiations while still seeking to achieve set objectives
9. the specified outcomes of negotiations
10. the purpose of keeping to the brief and level of authority during negotiations
11. how to ensure that goodwill is maintained during negotiations and the benefits of achieving this
12. the senior decision-makers with whom to consult when the problems are out of your knowledge or authority
13. how to ensure the negotiations are completed
14. the purpose and benefits of keeping records of negotiations
15. the lessons learnt and why it is important to use them for further negotiations' improvement

Support negotiations in a business environment

Skills

1. communicating
2. negotiating
3. planning
4. problem solving
5. making proposals
6. reporting
7. researching

Support negotiations in a business environment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAG123, CFABAG124

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; negotiations

Carry out and maintain administrative services

Overview

This standard is about carrying out and maintaining administrative services. These services aim to meet specified needs, recommending improvements, where necessary. It includes working with users as part of design, planning and implementation process, checking that services are being used within specifications while seeing feedback to meet the requirements. This is a cyclical activity with many iterative loops, so the performance criteria are not necessarily in chronological order. For example, it may be necessary to review and evaluate certain administrative services, before designing new ones.

It is for business administration professionals in supervisory or managerial roles who have responsibility for carrying out and maintaining administrative services.

Carry out and maintain administrative services

Performance criteria

You must be able to:

1. identify administrative services for planning and implementation
2. develop and record specifications in accordance with legal and organisational requirements
3. agree specifications and budgets for administrative services
4. produce design options for administrative services within agreed specifications and budgets
5. agree plans for implementation of administrative services
6. check that plans conform to legal and regulatory requirements
7. implement administrative services in accordance with agreed plans
8. involve users in planning how administrative services will be implemented
9. work with users to meet requirements for administrative services, systems and procedures to support them
10. provide support to users to enable them to use administrative services
11. take action to minimise disruptions to work output and the working environment during the implementation
12. monitor the administrative services to ensure these are being used within specified requirements
13. take the action where administrative services are not being used within the requirements
14. encourage users to comment on administrative services and suggest how they could be improved
15. collect the relevant information for evaluation of administrative services
16. make improvements to the administrative services in accordance with legal and regulatory requirements
17. communicate the administrative services' improvements to all involved

Carry out and maintain administrative services

Knowledge and understanding

You need to know and understand:

1. the administrative services in own area of responsibility
2. the specifications and budgets for administrative services
3. the legal and regulatory requirements for administrative services
4. the levels of own authority in relation to the implementation, monitoring and maintenance of administrative services
5. how to agree specifications and budgets for administrative services
6. how to develop plans for implementation of administrative services
7. the relevant users for implementation and maintenance of administrative services
8. how to provide support in planning and implementation of administrative services
9. the types of support available and how to choose and provide the most appropriate type of support to users of administrative services
10. how to identify possible disruptions to work output and the working environment
11. how to monitor the administrative services within specified requirements
12. the actions to take if services are not being used within the requirements
13. how to encourage users to comment and suggest improvements to the administrative services
14. how to collect the information for evaluation of administrative services
15. the required changes to existing administrative services or the implementation of new ones
16. how to identify possible improvements in administrative services and the benefits that could arise
17. the relevant members of staff for communicating the improvements

Carry out and maintain administrative services

Skills

1. checking
2. communicating
3. consulting
4. decision-making
5. listening
6. managing information
7. managing time
8. negotiating
9. planning
10. reading
11. researching
12. using technology
13. questioning

Carry out and maintain administrative services

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA119, CFABAA122

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration, administrative services

Overview

This standard is about designing and producing high-quality, professional documents in accordance with agreed specifications. It includes clarifying the requirements for the documents, checking work for accuracy, editing and correcting these as necessary.

This standard is for business administration professionals who design and produce documents.

Performance criteria

You must be able to:

1. agree the purpose, content, style, quality standards for the documents
2. confirm the deadlines for completion of the documents
3. allocate and prepare the required resources for the documents' production
4. research and prepare the required content
5. use the relevant technology for the documents' production
6. draft the documents in accordance with agreed specifications and format
7. review the drafts and incorporate review comments
8. check the documents for accuracy and amend as required
9. design and produce the documents in the agreed style
10. integrate non-text objects in the agreed layout
11. save and store the document safely and securely in relevant locations
12. adhere to the relevant data protection and confidentiality legislation
13. clarify document requirements, when necessary
14. use the relevant methods for the documents' version control
15. review, edit and update the documents on a regular basis

Knowledge and understanding

You need to know and understand:

1. the purpose, content, style, quality standards for the documents
2. the deadlines for completion of the documents
3. how to allocate and prepare the required resources for the documents' production
4. the different formats in which the documents can be presented
5. the different types of technology available for inputting, formatting and editing documents and their main features
6. the agreed specifications and formats for the documents' production
7. how to seek the review of the documents and incorporate the comments
8. how to check the documents for accuracy, including spelling and grammar
9. how to design the documents in the agreed style
10. how to integrate and layout text and non-text objects
11. how to save and store the document safely and securely
12. the relevant data protection and confidentiality legislation
13. the methods of keeping version control of the documents
14. why it is important to review and update the documents on a regular basis

Design and produce documents in a business environment

Skills

1. checking
2. designing
3. listening
4. managing time
5. negotiating
6. organising
7. questioning
8. researching
9. using technology
10. using version control
11. reviewing, proofreading, editing

Design and produce documents in a business environment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA211, CFABAA212

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; documents

Overview

This standard is about communicating in a business environment. It covers meeting and welcoming visitors, providing individuals with information, ensuring visitors' needs are met, presenting a professional image of the organisation. You identify the purpose of communications, audience needs, decide communication methods and platforms to achieve outcomes. You use various types of communication that vary from face-to-face, on the telephone or in a virtual environment through relevant digital technologies and collaboration platforms. You communicate in ways that suit the audience, making decisions about the level of formality required for the communication and how to present ideas in a way that will engage the audience. You seek feedback to ensure that the communication achieved its purpose and to further develop your communication skills.

It is for professionals in business administration roles who plan communication and communicate in a business environment.

Performance criteria

You must be able to:

1. identify the purpose of communication
2. identify audiences for communication
3. choose communication style that meets the needs of audiences
4. decide the methods for each type of communication
5. identify and use the digital technologies and collaboration platforms for different types of communication
6. define the communication outcomes to be achieved
7. record any messages and forward them to the relevant members of staff
8. respond to messages or queries within agreed organisational timing and format
9. meet communication deadlines, prioritising what is important and what is urgent
10. select information that supports the purpose of communications
11. extract the main points needed from written materials
12. organise, structure and write information to match communication messages
13. organise, structure and write information to suit different audiences
14. use accurate grammar, punctuation and spelling
15. write communications in your organisation's required format, layout, tone and house style
16. write communications that match the subject matter, work situation and communication channel
17. proofread written work and make amendments to create final version
18. file copies of all communications following organisational procedures
19. present verbal information and ideas to audiences
20. make verbal contributions to move discussions forward
21. use body language and voice tone that matches the messages
22. listen actively to speakers to gain information
23. respond to speakers to share your perspective
24. ask questions to check understanding of speaker messages
25. direct discussions to achieve outcomes
26. adapt your contributions to suit the audience, purpose and situation
27. respond to speakers using body language to suit the audience

- and situation
28. provide opportunities for speakers to contribute their ideas and opinions
 29. consider the ideas and opinions of different speakers
 30. overcome barriers to verbal communication
 31. summarise verbal communications with speakers to confirm agreement
 32. seek feedback on your communication manners, format and style
 33. evaluate all means of communication to identify how well they met their purpose
 34. reflect on communications outcomes
 35. identify ways to develop your communication skills further

Knowledge and understanding

You need to know and understand:

1. the reasons for identifying the purpose of communication
2. the communication style in accordance with the needs of the audience
3. the importance of understanding the audience and the outcomes to be achieved
4. the digital technologies and collaboration platforms for different types of communication
5. how to define the outcomes for different types of communications
6. the methods of communication that can be used and how to select them according to the situation
7. how to identify the relevant style for communications
8. the sources of information used for written communications and how to extract key points
9. how to check the accuracy of information
10. the importance of using language appropriate to the audience, the communication method and the purpose of the communication
11. how to use grammar, punctuation and spelling accurately
12. the reasons for proofreading and checking written communications and the potential impact of errors
13. how to recognise when work is urgent or important to prioritise written communications
14. the organisational procedures for responding to written message
15. how to record any messages and forward them to the relevant members of staff
16. how to format information following organisational guidelines
17. the principles of 'netiquette' in online communications
18. how to judge the tone and style required for written communications and the impact that these can have on audiences
19. how to organise, structure and present information to different audiences
20. how to communicate information and ideas to different audiences
21. how to contribute to discussions that will help to move them forward to achieve objectives
22. how to interpret speakers body language and tone of voice
23. how to use body language and tone of voice to support communication messages
24. the importance of active listening and methods that can be used

25. the ways of contributing and directing discussions to achieve outcomes
26. the importance of adapting verbal contributions to suit different audiences, purposes and situations
27. how to use language to suit the audience and situation
28. the reasons for seeking ideas and opinions from others and for taking these into account
29. the barriers to verbal communication and how these can be overcome
30. the reasons for summarising communication and the impact this has
31. how to seek feedback to check that communications achieve their purpose
32. the value of reflecting on the outcomes of communication and of identifying ways to further develop your communication skills
33. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Communicate in a business environment

Skills

1. communicating
2. organising
3. preparing
4. reflecting
5. analysing
6. evaluating
7. judging

Communicate in a business environment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA613, CFABAA614, CFABAA615, CFABAA616

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; communication

Overview

This standard is about developing and delivering a presentation. You agree the purpose, content, style and length of the presentation then research and develop the presentation to suit your audience. When delivering the presentation, you use voice tone, pace, volume and body language to reinforce the presentation's message and maintain audience interest. You make contingency arrangements for potential problems that may arise. The standard also includes you reflecting on the outcomes of the presentation to identify personal learning points and improvements for future presentations.

It is for professionals in business administration roles who develop and deliver a presentation.

Develop and deliver a presentation

Performance criteria

You must be able to:

1. confirm the presentation audience and their needs
2. agree the objectives, content, style and time of the presentation with stakeholders
3. research content for use in the presentation
4. identify the equipment, software and resources required for creating and delivering the presentation
5. prepare the presentation to meet the objectives and needs of the audience
6. produce presentation handouts and supporting materials
7. provide the opportunity for colleagues to contribute their ideas and opinions to the design
8. develop contingency plans in case of equipment failure or other problems
9. practise delivery of your presentation
10. check that the equipment and resources are in working order
11. prepare presentation materials for the audience
12. introduce yourself to the audience and state the aims of the presentation
13. speak clearly and confidently, using language which is appropriate to the topic and the audience
14. use the relevant equipment or tools to run the presentation
15. vary your voice tone, pace and volume to emphasise key points and maintain the audience's interest
16. use your body language in a way that reinforces your message
17. gauge audience reactions during the presentation and adapt your delivery accordingly
18. summarise the key points following your presentation
19. provide an opportunity for the audience to ask questions
20. listen carefully to questions and clarify your understanding
21. meet the audience's needs when answering questions
22. collect feedback on the presentation
23. reflect on your own performance and identify learning points
24. resolve any problems that occur during development, preparation and delivery
25. evaluate the presentation and identify changes that will improve future presentations
26. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. how to confirm the presentation requirements with stakeholders
2. the advantages and disadvantages of using presentations to provide information
3. the equipment, software and resources for presentation
4. how to research and select content for inclusion in presentations
5. the different ways of developing presentations and their features
6. how to select the best approach for delivering presentations
7. how to prepare presentations that are engaging, interesting, relevant and informative
8. how to tailor presentations to the audience to meet their individual and group needs
9. how handouts and supporting materials can be used to complement presentations
10. how to tailor the presentation to the audience's needs
11. the purpose and benefits of rehearsing presentations
12. the impact that language, body language, voice tone, volume and pace have on the audience and how to use these to gain maximum engagement
13. how to practise delivering presentations within the time allocated
14. how to adapt delivery based on practising beforehand
15. how handouts can complement presentations
16. the types of equipment used for presentations and their features
17. the importance of checking equipment in advance
18. how to use the equipment for running presentations
19. the types of problems that may occur with presentation equipment and how to deal with them
20. how to gauge audience reactions to the presentation
21. the importance of responding effectively to audience questions and the impact this has
22. the methods of collecting feedback from the audience on the presentation
23. how to evaluate the presentation from a personal and organisational perspective
24. how to identify changes in own practice for future presentations
25. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Develop and deliver a presentation

Skills

1. communicating
2. evaluating
3. managing time
4. organising
5. planning
6. delivering

Develop and deliver a presentation

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA617, CFABAA623

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; presentation; communication

Overview

This standard is about the organisation and coordination of corporate events. It includes communicating with stakeholders regarding budgets, identifying venues, producing event materials, supporting activities before, during and after the event. The standard also covers organising the virtual event through relevant digital tools, technologies or collaboration platforms. It also includes managing electronic diaries to make, update and coordinate appointments.

It is for professionals in business administration roles who have responsibility for organising and coordinating corporate events.

Performance criteria

You must be able to:

Manage electronic diaries

1. make diary entries accurately and clearly for all event related appointments and activities
2. update the diary to reflect any agreed changes
3. send out invitations for the event to all attendees
4. solve problems by negotiating alternative arrangements where appointments conflicts occur
5. confirm agreed changes to attendees affected

Organise and run the event

6. agree a plan for the event in accordance with agreed objectives
7. identify the relevant digital technology or collaboration platform for running a virtual event
8. ensure all attendees received the electronic invitations and confirmed their attendance
9. inform all attendees about the digital platform you are using for the virtual meeting
10. pre-test the software with all attendees before the event
11. address any potential risks and identify contingencies
12. allocate suitable venues and calculate their costs in accordance with agreed budget requirements
13. identify and agree the resources and support required for the event
14. liaise with the venue members of staff to confirm event requirements
15. follow the relevant legal and contractual requirements
16. ensure the event complies with health, safety and security requirements
17. support production and distribution of event materials
18. provide delegates with joining instructions and event materials
19. make arrangements for rehearsals, if required, to ensure the event runs in accordance with plan
20. delegate functions to the event team members and ensure they are briefed and trained to fulfil their roles
21. ensure all necessary facilities and resources are in place during the event
22. coordinate activities and resources during the event in accordance with agreed plans

Organise and coordinate corporate events

23. respond to delegates' needs throughout the event
24. ensure the speakers' attendance and presentations in an agreed sequence and timescales
25. ensure all visual content is in place and presented in agreed format
26. resolve any issues in a professional and timely manner
27. monitor compliance with relevant health, safety and security requirements

After the event

28. clear and vacate the venue, in accordance with the terms of the contract
29. conduct follow-up activities, as required
30. distribute the feedback forms to all attendees
31. analyse any feedback from the event and share with relevant members of staff
32. agree key learning points and use these to improve the running of future events

Organise and coordinate corporate events

Knowledge and understanding

You need to know and understand:

1. the diary entries in relation to all event related appointments and activities
2. how to update the diary to reflect any agreed changes
3. the electronic invitations for the event to all attendees
4. the alternative arrangements where appointment conflicts occur
5. the agreed changes to attendees affected
6. how to organise and co-ordinate event plans to meet the objectives of the brief
7. the types of events and their main features
8. the relevant digital technology or collaboration platform for running a virtual event
9. why it is important to pre-test the technologies before the event
10. how to identify suitable venues for different types of events
11. the types of resources required to prepare for different types of events
12. the types of risks associated with events and how to minimise these
13. the equipment required for the event and how to test it
14. the visual displays and materials required for the event
15. the type of information that delegates will need and any special requirements that delegates may have
16. how to coordinate the speakers presenting themselves during the event within agreed order of appearance and timescales
17. the types of activities and resources that may need to be co-ordinated during an event
18. the types of issues which may occur during events and how to deal with these
19. the points to observe when clearing and vacating an event
20. the types of follow-up activities that may be required to carry out
21. the health, safety and security requirements when organising events
22. the legal and organisational requirements for contracts
23. the purpose and value of evaluating an event and the methods you can use
24. the types of papers that may need to be circulated after an event
25. the budgetary responsibilities and procedures
26. the types of information you must obtain

27. the purpose of keeping the records up to date
28. the purpose of trying to balance the needs of all those involved
29. the different types of problems that may occur when new requests are made and solutions to these problems
30. the feedback forms for collating evaluation responses after the event
31. how to analyse the collated feedback and identify points for improvement

Organise and coordinate corporate events

Skills

1. checking
2. communicating
3. decision making
4. interpersonal skills
5. managing resources
6. managing time
7. planning
8. monitoring
9. negotiating
10. organising
11. problem solving

Organise and coordinate corporate events

Developed by	Instructus
---------------------	------------

Version Number	1
-----------------------	---

Date Approved	February 2021
----------------------	---------------

Indicative Review Date	March 2026
-------------------------------	------------

Validity	Current
-----------------	---------

Status	Original
---------------	----------

Originating Organisation	Instructus
---------------------------------	------------

Original URN	CFABAA311, CFABAA312, CFABAA431
---------------------	---------------------------------

Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
-----------------------------	--

Suite	Business and Administration
--------------	-----------------------------

Keywords	Business; administration; event, organisation, presentation, electronic diary
-----------------	---

Organise and coordinate business travel and accommodation

Overview

This standard is about organising and coordinating business travel and accommodation. It includes confirming travel or accommodation requirements and the budget available. You research, organise and agree arrangements for travel and accommodation, making sure they meet organisational and travellers' requirements and are best value for money. You keep accurate records for all aspects of the travel or accommodation arrangements and store this securely in accordance with organisational and legal requirements.

It is for professionals in business administration roles who organise and coordinate business travel and accommodation.

Organise and coordinate business travel and accommodation

Performance criteria

You must be able to:

1. confirm travel or accommodation requirements with colleagues
2. confirm the budget available for travel or accommodation
3. research the available travel or accommodation to meet requirements
4. contact travellers to check their draft itineraries
5. book the best value travel or accommodation available within the budget
6. obtain foreign currency, travel insurance and visas, if required
7. obtain all documents and information for travel or accommodation to meet the requirements
8. collate all documents and information for travel or accommodation against itineraries
9. maintain records of travel or accommodation that is requests and bookings
10. store confidential information and financial records securely in line with legal and organisational policy and procedures
11. arrange payments for travel or accommodation to meet supplier requirements
12. solve any problems with travel or accommodation arrangements in line with organisational policy and procedures
13. provide itineraries, documents and information to the travellers by the required deadline
14. confirm that itineraries, documents and information meet travellers' requirements
15. respond to travellers' requests for additional information, if required
16. maintain a record of the external services and suppliers used for travel and accommodation
17. evaluate the external services and suppliers used to identify those that provide best value
18. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. why it is important to confirm the requirements for travel and accommodation
2. how to confirm the budget available for travel or accommodation and how this varies for different people, functions and levels within an organisation
3. where travel and accommodation budget information is held and how it access it
4. how to organise and support business travel or accommodation to meet different colleague and travellers' expectations
5. the main types of travel or accommodation arrangements that are required
6. the organisational policies and procedures to follow when booking travel and accommodation
7. the sources of information, services and suppliers that are used to make travel or accommodation arrangements
8. how to get best value for money when making travel or accommodation arrangements
9. how to identify if foreign currency, insurance and visas are required and how to obtain these
10. how to keep records of travel or accommodation requests, bookings and financial records
11. the types of travel and accommodation information that are confidential and how to follow current legislation when storing them
12. how to obtain travel and accommodation documents and information to provide them to travellers
13. how to make payment for travel or accommodation using organisational procedures
14. the types of problems that may occur with travel or accommodation arrangements
15. the correct procedures to follow to respond to any problems that occur
16. why it is important to evaluate the travel or accommodation services and suppliers used and record the findings of the evaluation for future use
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Organise and coordinate business travel and accommodation

Skills

1. communicating
2. confirming
3. decision making
4. evaluating
5. managing time
6. negotiating
7. planning
8. problem solving
9. researching
10. organising

Organise and coordinate business travel and accommodation

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA321, CFABAA322
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; travel; accommodation

Overview

This standard is about organising and running meetings. These can be face-to-face or conducted remotely using appropriate technology. You will be responsible for planning meetings and agendas. It involves organising the venue and ensuring meeting invites are sent out to attendees. For remote meeting you will need to test the software in advance to ensure all attendees have access to it and all functions are working. You will prepare for the meeting, take minutes, agree these with relevant members of staff and ensure that follow-up actions are clearly identified. It also involves producing records of discussions, decisions taken during meetings.

It is for professionals in business administration roles who are responsible for organising and running meetings.

Performance criteria

You must be able to:

Before the meeting

1. plan and agree the meeting brief
2. agree agenda items, time required for each item and meeting papers required
3. prepare the agenda including matters arising and action points from the last meeting
4. finalise agenda and the meeting papers
5. set day, time and location of the meeting
6. send out the agenda and all accompanying materials, where required
7. invite attendees, confirm attendance and identify any special requirements
8. organise and confirm venue, equipment and catering requirements, ensuring meeting facilities are in accordance with requirements
9. check equipment and layout of room meets meeting brief
10. test the software required for the meeting remotely
11. make sure someone has been nominated to take minutes, if required

During the meeting

12. greet people attending the meeting
13. ensure all attendees have the papers and other resources they need
14. take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law
15. start meeting on time
16. provide advice and support information, run presentation materials
17. allow opportunities for attendees to contribute
18. manage individual agenda items to ensure meeting duration is adhered to
19. summarise discussions and agree actions, where required
20. observe formal voting and approval procedures, if appropriate
21. agree date, time, location and mode of the next meeting
22. close the meeting on time

After the meeting

23. clear and vacate the meeting venue according to requirements

Organise and run meetings

24. maintain a record of external services, where these have been used
25. approve meeting records and list of actions
26. produce accurate minutes that record the meaning of discussions and the decisions taken
27. agree the minutes with relevant members of staff and circulate within specified timescales
28. ensure minutes are in agreed format
29. collect and evaluate participant feedback from the meeting and share the results with relevant members of staff
30. ensure follow-up actions and responsible attendees have been clearly identified
31. reflect on whether the meeting met its purpose and agree learning points to improve the running of future meetings
32. ensure the process for signing off minutes and action points has been agreed
33. keep track of agreed actions, record their progress and completion
34. observe all requirements for confidentiality and sensitivity in line with organisational policy
35. store the minutes securely in accordance with following organisational procedures

Knowledge and understanding

You need to know and understand:

1. the different types of meetings, their main purposes and objectives
2. how to plan meetings to meet agreed aims and objectives
3. the purpose of agreeing agenda items and allocating times for agenda items
4. the types of information attendees require
5. the purpose and benefits of minutes as an accurate record of discussions and decisions
6. the documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets and etc
7. how to identify suitable venues or software for different types of meetings
8. the types of information that attendees will need
9. the types of resources, including technology, needed for different types of meetings
10. why it is important to test the software before the meeting
11. the health, safety and security requirements when organising meetings
12. any special requirements that attendees may have and how to meet them
13. the main points that should be covered by an agenda and meeting papers
14. the types of information, advice and support that may be asked to be provided during meetings
15. the purpose of approving records of previous meetings, if applicable
16. how to facilitate discussions so that the purpose of each agenda item is achieved
17. how to take notes during discussions
18. how to sort, select and structure information to produce minutes
19. how to summarise discussions and agree actions at appropriate points
20. the types of problems, including conflict, that may occur during meetings and how to resolve them
21. how to record and follow up actions
22. how to evaluate external services
23. the organisational procedures for clearing and vacating a meeting

room

24. the different ways to collect and evaluate participant feedback from the meeting
25. how to agree learning points to improve the organisation of future meetings

Organise and run meetings

Skills

1. communicating
2. checking
3. decision making
4. evaluating
5. interpersonal skills
6. facilitating
7. organising
8. leading
9. managing resources
10. managing time
11. planning
12. problem-solving
13. summarising

Organise and run meetings

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA411, CFABAA412, CFABAA413, CFABA441

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; meetings

Overview

This standard is about preparing and maintaining contracts. It covers inviting, receiving, evaluating tenders, selecting the successful contractor and awarding contracts. It includes preparing specifications for contracts, answering pre-tender queries, preparing and agreeing selection criteria, negotiating contracts with suppliers and monitoring contractor performance.

It is for business administration professionals in supervisory or managerial roles who prepare and maintain contracts.

Performance criteria

You must be able to:

Appoint contractors through bidding process

1. promote invitation to tender include full information about the tendering process
2. prepare specifications for products and services
3. ensure specifications and contracts are clear, logical and feasible and contain the correct terminology
4. answer pre-tender queries within specified timescales
5. prepare and agree selection criteria for specifications for products and services
6. record, open and receive tenders in accordance with the stated tendering process
7. identify requirements for contractors within timescales
8. evaluate tenders against criteria and select the successful bidder
9. inform unsuccessful bidders and provide them with feedback where appropriate
10. award the contract, complying with legislation and regulations

Monitor contractors' performance

11. develop and maintain relationships with contractors and suppliers
12. communicate with contractors and suppliers involved in the process
13. check compliance with contract in accordance with legal, regulatory and organisational requirements
14. make sure contract objectives are being met
15. agree action to rectify any variances from contract objectives
16. deal with any deviations or breaches from the contract within specified timescales

Evaluate contractors' performance

17. agree the criteria for evaluating contractor's performance
18. gather and analyse information using the agreed criteria
19. identify and report on contractors' performance and areas for improvement

Knowledge and understanding

You need to know and understand:

1. the range of products and services to be contracted
2. the different types of contracts and agreements
3. the specifications for products and services
4. how to prepare a specification for products or services
5. the relevant terminology for specifications and contracts
6. the purpose and benefits of having objective selection criteria
7. the purpose and benefits of inviting a range of potential contractors to bid for the contract
8. the key points to consider when evaluating tenders
9. how to identify key requirements for contractors
10. how to negotiate with suppliers and answer to their queries within specified timescales
11. the legal, regulatory and organisational requirements governing the process of tendering and awarding contracts
12. how to communicate the feedback to unsuccessful bidders
13. the purpose and benefits of building working relationships with contractors
14. the methods of monitoring deliverables and compliance with a contract
15. how to track the achievement of contract objectives
16. what constitutes a variation or breach of contract and what to do if it occurs
17. the criteria to be used to evaluate suppliers contract performance
18. the methods of evaluating and reporting on contractors' and suppliers' performance strengths and areas for improvement

Prepare and maintain contracts

Skills

1. analysing
2. evaluating
3. negotiating
4. monitoring
5. planning
6. prioritising
7. problem solving
8. reporting

Prepare and maintain contracts

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAF111

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; contractors, bidding, tendering

Overview

This standard is about supporting and maintaining information systems. It includes identifying the information within the system and the resources required to develop and maintain it, including testing the system against the specification. You contribute to the training and support of users, monitor your own use of the system. You also collect feedback and contribute to the evaluation of the information system. It is for professionals in business administration roles who are responsible for supporting and maintaining information systems.

Support and maintain information systems

Performance criteria

You must be able to:

1. identify the information that will be managed within the information system
2. identify the resources required to develop the information system
3. confirm that resources are available to design, deliver and implement the system
4. update the information systems to meet users' needs when required
5. design a system specification that meets identified organisational needs
6. develop an information system that meets the specification
7. test the information system against the agreed specification
8. resolve faults within the limits of own authority
9. monitor the use of the information systems
10. monitor the accuracy of information systems to meet organisational requirements
11. monitor the productivity of information systems to meet organisational requirements
12. monitor own use of the information system
13. contribute to user training
14. contribute to ongoing user support
15. follow legal and organisational requirements for handling information
16. maintain the information system within own limits of authority
17. update the information system to meet users' needs, within own limits of authority
18. collect feedback on performance of information system
19. contribute to the evaluation of feedback
20. identify and prioritise system and user development needs
21. contribute information to enable further system development
22. identify and report problems when they occur
23. resolve problems within own limits of authority
24. follow legal and organisational policies and procedures when designing, developing and supporting the management of an information system

Knowledge and understanding

You need to know and understand:

1. the purpose and benefits of managing information to meet specifications
2. the types of information that need to be managed in an organisation
3. the types of information systems available and their main features
4. the purpose and benefits of identifying and agreeing user needs for information systems
5. how to develop specifications for information management, considering the available resources and budgets
6. how to create and develop an information system based on identified organisational and user needs
7. how to monitor the use of information systems
8. the productivity of information systems
9. the purpose and benefits of testing information systems
10. how to test information systems
11. how to resolve information system faults, within the limits of own authority
12. the benefits of training users of the information system
13. how to provide ongoing support to system users
14. the purpose of monitoring the use of information systems
15. how to use available methods to monitor information systems
16. the purpose of updating information systems
17. the methods you can use to update information systems
18. the types of problems that occur with information systems
19. how to identify and analyse problems and develop a strategy to solve them
20. the legislation and organisational requirements covering data protection and freedom of information
21. how to obtain feedback on use of information systems
22. the different ways of evaluation of information systems
23. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Support and maintain information systems

Skills

1. analysing
2. evaluating
3. managing resources
4. negotiating
5. organising
6. planning
7. researching
8. using technology
9. problem solving
10. monitoring
11. developing others

Support and maintain information systems

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAD111, CFABAD112 and CFABAD121

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; information; data

Overview

This standard is about carrying out and analysing research. It includes planning research with stakeholders and carrying it out within the agreed timescales. You select relevant, valid, reliable and accurate data from different sources and adjust it when required. The standard also includes collating data ready for analysis and organising it in an agreed format. You use appropriate analysis techniques to produce accurate, unbiased results. You produce a research report and present your conclusions in the agreed format and get feedback on from stakeholders.

It is for professionals in business administration roles who carry out and analyse research.

Performance criteria

You must be able to:

1. define the aims and objectives of research
2. agree aims and objectives of the research with stakeholders
3. confirm the deadlines for the research report with stakeholders
4. confirm the resources available for research
5. identify the primary and secondary research methods to be used
6. select data for analysis from different sources
7. check that data is relevant, valid, reliable and accurate
8. get feedback from colleagues about the data if required
9. adjust raw data, if required
10. collate data to prepare it for analysis
11. select analysis techniques that are fit for purpose
12. use analysis techniques that match the aims and objectives of the research
13. check the accuracy of your analysis using techniques that are approved by your organisation
14. adjust the data analysis where necessary
15. produce accurate and unbiased results
16. draw conclusions from the analysis of data
17. produce a research report that meets the aims and objectives agreed with stakeholders
18. present conclusions on time and in the agreed format
19. complete the research within the agreed timescale
20. get feedback about your conclusions from stakeholders
21. apply relevant ethical frameworks to protect privacy and security of research information obtained
22. evaluate your research to identify future improvements in how you select, collate, analyse and report research

Knowledge and understanding

You need to know and understand:

1. how to define research aims and objectives
2. how to work with stakeholders to agree aims, objectives and deadlines
3. the differences between primary and secondary research methods
4. the differences between quantitative and qualitative research methods
5. the different data sources available
6. the methods that can be used to search for data
7. how to access and extract data for research
8. why data may need to be adjusted
9. the methods used to adjust data during collection and analysis
10. the techniques used to check that data is relevant, reliable, valid and accurate
11. the purpose of getting feedback on data that has been found from research
12. the different ways of organising data that has been gathered
13. how to collate and organise data for analysis
14. the analysis techniques which produce accurate and unbiased results
15. the different formats that may be required when reporting data
16. the importance of presenting data to the agreed reporting format
17. why research must be completed by the agreed timescales and the potential impact of delayed reporting
18. how to gather feedback about the research from stakeholders
19. how to evaluate research to identify and plan for future improvements
20. the relevant ethical frameworks to protect privacy and security of research information obtained
21. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Carry out and analyse research

Skills

1. analysing
2. communicating
3. decision making
4. selecting
5. planning
6. presenting information
7. researching
8. using technology
9. problem solving
10. report writing

Carry out and analyse research

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAD321, CFABAD322
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; research; data; analyse

Overview

This standard is about storing, sharing, retrieving and archiving information using relevant systems in accordance with organisational procedures and legal requirements. The systems that you use may be electronic or paper based. You identify, collect, store, update and delete information in approved locations, using organisational procedures and legislation. You access information systems to locate, share, retrieve and provide required information within the agreed timescales. You identify and agree the information to be archived and maintain records of archived information for the retention period. For any problems that occur, you resolve or report them to a colleague when storing, sharing, retrieving and archiving information.

It is for professionals in business administration roles who store, share, retrieve and archive information.

Performance criteria

You must be able to:

1. identify information for storing, sharing or retrieval
2. use organisational procedures for accessing information
3. use the relevant systems for information storage, sharing and retrieval
4. follow the cyber security requirements for storage, sharing or retrieval of information
5. resolve or report problems with the system that occur during information storage
6. confirm requirements and timescales for information storage, retrieval or sharing with colleagues or customers
7. locate the required information in the information systems
8. retrieve required information from the information systems
9. resolve or report any problems that occur during retrieval of information
10. provide information in the agreed format to colleagues or customers
11. meet the agreed timescales for retrieving information
12. retrieve archived information on request
13. follow legal and organisational procedures to maintain the security and confidentiality of the information
14. identify information to be archived
15. agree the retention period for archived information
16. archive information within agreed timescales
17. comply with organisational policies, procedures and legislation requirements when archiving information
18. maintain archive records following legal and organisational procedures
19. update archived information records
20. delete information from the archive following legal and organisational policy and procedures
21. resolve or report problems that occur when archiving information
22. follow the legal, organisational, codes of practice and policies relevant to information management and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. how information is stored, shared, retrieved or archived
2. the methods that can be used to collect information for storage and sharing
3. the requirements of cyber security for storage, sharing or retrieval of information
4. the types of internal and external information systems and their main features
5. the different filing locations for storage and sharing information
6. how to meet agreed timescales for storing, sharing, retrieving and archiving information
7. the legal and organisational requirements in relation to security and confidentiality of information during storage, sharing, retrieval and archiving
8. the legislation and organisational procedures covering data protection
9. the organisational and external supplier procedures to be followed to access storage systems
10. the legal and organisational procedures for deleting information and why they must be followed
11. how to check that information is accurate before storing or sharing it
12. the problems that occur with systems during storage, retrieval and archiving
13. who to report filing system problems to
14. how to agree timescales with colleagues and customers
15. how to check that retrieved information meets colleague or customer requirements
16. how to provide information in the required format for colleagues or customers
17. why it is important to meet agreed timescales and the potential impacts if they are missed
18. why information is archived
19. how to archive information
20. how to maintain archive records using organisational and supplier procedures
21. when information is deleted from storage and archive filing systems

- 22. how information is deleted from storage and archive filing systems
- 23. the legal, organisational, codes of practice and policies relevant to information management and the activities being carried out

Store, share, retrieve and archive information

Skills

1. communicating
2. organising
3. planning
4. problem solving
5. using technology

Store, share, retrieve and archive information

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAD332, CFABAD334

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; data; store, retrieve; archive

Overview

This standard is about managing office facilities, resources and equipment to meet the needs of office users. It includes identifying and agreeing the needs of office users and reviewing systems and procedures. You will also maintain office equipment, identifying equipment that requires repair or replacement. You solve problems related to facilities, resources and equipment, ensuring that legal, organisational health, safety and security requirements are met. You also handle and store products safely and securely, keeping accurate records of stock levels. You dispose of unwanted or damaged products safely, in line with organisational policy and procedures.

It is for professionals in business administration roles who have responsibility for managing office facilities, resources and equipment.

Manage office facilities, resources and equipment

Performance criteria

You must be able to:

1. identify and agree the needs of office facility users
2. develop office systems and procedures
3. maintain office facilities, resources and equipment to meet the needs of users
4. maintain resources and equipment to meet the needs of users
5. provide an office environment conducive to productive working
6. communicate priorities to office facility users
7. monitor the use of office facilities
8. monitor expenditure to keep within agreed budgets
9. supervise the use of office resources and equipment
10. use office systems in accordance with your organisational procedures
11. check that office equipment is working efficiently
12. identify office facilities and equipment in need of repair or replacement
13. organise repairs or replacements to the office facilities and equipment when necessary
14. analyse problems with the office facilities
15. resolve problems within defined organisational timescales
16. provide information and guidance on office facilities
17. accept orders and check products and services against the order
18. maintain stock to your organisation's specified levels
19. handle stock safely and securely to maintain its condition
20. store stock safely and securely to maintain its condition
21. carry out stock-takes and report any problems
22. re-order stock from suppliers
23. dispose of unwanted or damaged stock items safely, following organisational procedures and legal requirements
24. provide information and guidance on office resources and equipment
25. co-ordinate the use of office resources to meet users' needs
26. evaluate office systems and procedures and make improvement recommendations
27. rearrange systems and procedures to make improvements
28. build relationships with internal and external customers and suppliers
29. maintain relationships with internal and external customers and suppliers

30. maintain the health, safety and security of office users following organisational procedures

Knowledge and understanding

You need to know and understand:

1. the range of office facilities, equipment and resources and what they can be used for
2. the methods used to regularly review the needs of office users to meet their needs
3. the ways that office systems can be developed to meet user needs
4. the types of information provided to users to help them use the office systems in line with organisational procedures
5. how to maintain office facilities, resources and equipment to meet expectations of the users
6. the types of activities to monitor to control office facilities
7. how to identify office facilities, resources and equipment in need of repair or replacement
8. how to organise repair or replacements of office facilities, resources and equipment in line with organisational timescales
9. the types of office systems and procedures appropriate to your responsibilities and their purpose
10. the budgets available to manage the office systems and how to monitor expenditure
11. the main health, safety and security legal and organisational requirements that apply in an office environment and why they are important
12. how to monitor office facilities and the types of activities to monitor
13. how to develop office systems and procedures appropriate to own responsibilities
14. how to review office systems and procedures, taking account of feedback from users
15. how to evaluate office systems and procedures to make recommendations for continuous improvements
16. the purpose and benefits of building relationships with internal and external customers and suppliers
17. the methods used to build relationships with internal and external customers and suppliers
18. the checking and ordering procedures of products and services
19. how to maintain stock to your organisation's specified levels
20. the safety procedures for handling stock safely and securely
21. how to maintain the stock in its condition

Manage office facilities, resources and equipment

22. the methods of keeping stock-takes
23. how to re-order stock from suppliers
24. the disposal procedures of unwanted or damaged stock items
25. the main health, safety, security and access requirements important to an office environment
26. your responsibilities for health, safety, security and access requirements
27. how to identify and document problems when they arise, following organisational procedures
28. how to analyse problems and develop a strategy to solve them
29. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Manage office facilities, resources and equipment

Skills

1. checking
2. communicating
3. developing others
4. evaluating
5. interpersonal skills
6. negotiating
7. planning
8. monitoring
9. problem-solving
10. organising
11. prioritising

Manage office facilities, resources and equipment

Developed by Instructus

Version Number 1

Date Approved February 2021

Indicative Review Date March 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAA118, CFABAA119

Relevant Occupations Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals

Suite Business and Administration

Keywords Business; administration; office equipment

Overview

This standard is about using office equipment in accordance with occupational regulations and safety guidelines. You produce work to agreed requirements and deadlines using a range of office equipment. You apply legal and organisational standards of health and safety and operating practices. You deal with or report any problems that arise and leave the equipment ready for the next user. You also follow the concepts of ergonomic practice and position the relevant parts of the body in line with relevant occupational regulations and health and safety guidelines when typing at a workstation.

It is for professionals in business administration roles who use office equipment in accordance with occupational regulations and safety guidelines.

Performance criteria

You must be able to:

1. identify the requirements for tasks to be carried out
2. agree deadlines for tasks with managers, colleagues or customers
3. locate the equipment and resources needed to complete tasks
4. select the equipment and resources needed to complete tasks
5. maintain ergonomic good practice when typing at a workstation following organisational and occupational regulations and health and safety guidelines
6. operate organisational guidelines to position your body to the size, slope and type of keyboard being used
7. set up your body position to align with the size and shape of the workstation being used
8. maintain workstations being used for typing operations
9. follow manufacturer's, organisational operating instructions and health and safety requirements for office equipment
10. use as few resources as possible to prevent waste
11. maintain clean and hygienic equipment by following your organisation's procedures
12. deal with equipment and resource problems according to manufacturer's and organisational procedures
13. report problems that you cannot deal with to the appropriate colleague
14. produce the final work product to meet the agreed requirements
15. produce the work product within agreed deadlines
16. prepare the equipment, resources and work area ready for the next user
17. follow the relevant health and safety requirements and legislation for the use of equipment

Knowledge and understanding

You need to know and understand:

1. how to identify and agree task requirements with managers, colleagues and customers
2. the importance of meeting task deadlines and the impact when they are not met
3. the different types of office equipment, their features and what they can be used for
4. how to choose equipment and resources that are appropriate for the task
5. where equipment and resources are located within the organisation and the ways that these are accessed
6. the organisational processes for booking the equipment required
7. the concepts of ergonomic practice relating to typing in accordance with occupational regulations and health and safety guidelines
8. how to position fingers, wrists, forearms and back in relation to the size, slope and type of keyboard and workstation being used
9. the organisational occupational regulations and health and safety guidelines for using different types of office equipment
10. the importance of following manufacturers' and organisational instructions when operating equipment
11. how to use different types of office equipment safely
12. the reasons for keeping resource waste to a minimum and how to do so
13. the reasons for keeping equipment clean and hygienic
14. the methods and organisational procedures and materials used for equipment care and maintenance
15. the types of equipment and resource faults you are likely to experience and the organisation's procedures for dealing with these
16. the importance of leaving equipment, resources and work area ready for the next user
17. the relevant health and safety regulations, requirements and legislation for the use of equipment

Skills

1. communicating
2. planning
3. problem solving
4. communicating
5. organising
6. using technology and equipment
7. cleaning

Developed by	Instructus
Version Number	1
Date Approved	February 2021
Indicative Review Date	March 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAE131, CFABAA241
Relevant Occupations	Administration; Administration and Law; Administration and Secretarial Occupations; Business; Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; health & safety; keyboards; office equipment