

UNIVERSITY OF CAMBRIDGE INTERNATIONAL EXAMINATIONS

**Cambridge International Diploma in Office Administration
Advanced Level**

Scheme of Work

5243
Office Procedures
Core Module



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International Examinations

Introduction

This Core module is concerned with preparing administrators to undertake a range of administrative duties.

What is assessed in this Module?

The ability to understand and implement:

- work planning methods
- regulatory requirements relating to work practices
- methods of contributing to the maintenance of a healthy, safe and secure working environment
- maintaining, developing and implementing a range of administrative procedures
- undertaking searches and selecting information
- organisation and procedures required for meetings
- arranging travel and accommodation

Tutor Preparation to Deliver this Module

- access to the Internet
- a wide variety of reference books and other resources
- a range of teaching / learning materials including specimens of office documents
- a range of visual aids – OHTS, flipcharts, handouts
- a range of textbooks and examples of past examination papers
- contacts with internal and external organisations which may allow visits by students
- access to office machinery and equipment e.g. computers, photocopiers and if possible fax
- handout of commonly mis-spelt words and homonyms

Underpinning Knowledge

- understanding the importance of accuracy and attention to detail
- a keen eye for presentation and layout
- a good standard of English in order to communicate clearly, concisely and in the correct tone for the occasion
- a good knowledge of the different aspects of office work relevant to specific business organisations

General Principles and Procedures

Lessons in Office Procedures are best conducted in an office environment. Students and tutors need access to relevant practical examples to support their work. Links with outside organisations, arranging visits to offices, inviting guest speakers, discussions in class, drawing upon any office experiences, role playing of office situations are all invaluable. Some schools and colleges provide valuable work experience sessions for their students either in local businesses or within the college office.

It is important that students are introduced to up-to-date office developments/documentation and resources/equipment.

Various forms of informal and formal assessment methods need to be incorporated into the teaching/learning process.

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At the start of every lesson, it is a useful technique to write the Learning Objectives on the board. At the end of the lesson assess whether these objectives have been met.

Scheme of Work

Competence Criteria	Classroom Ideas	Resources	Notes
Session One			
1.1	<ul style="list-style-type: none"> • introduction to the module • discuss need to plan work to complete the module • revise functions of the office and relate planning methods to office environment • elicit, through discussion, planning aids available – diaries, checklists, wall planners, personal organisers, visual aids used in the office • demonstrate use of electronic diaries etc. • discuss the need to set and meet deadlines, allocate and manage time and allocate work • meaning and purpose of delegation • group completion of planning assignment 	<ul style="list-style-type: none"> • flipchart • computer • examples of planning aids e.g. checklists, pre-printed forms, diaries, personal organisers, planners and visual aids • a short assignment comprising several related tasks to be undertaken to a deadline e.g. planning a three-day seminar, at an off-site location, to be attended by all departmental heads • flow chart to show examples of time management, work allocation and delegation 	<ul style="list-style-type: none"> • ensure that students have the opportunity to discuss and view as many examples of planning aids as possible and to use electronic aids • remind students of databases and spreadsheets as methods of record keeping • demonstrate by computer the use of monitoring computerised records

Session Two			
1.2 2.2	<ul style="list-style-type: none"> • revise, through discussion, the reasons for and regulations relating to Health and Safety at Work with particular reference to office situations (the use of a guest speaker or a planned visit to an office would make the topic more interesting and relevant) • design a questionnaire and check list for use in conducting Health and Safety report in a specific area e.g. the mail room • revise through brainstorming (spontaneous discussion) the specific hazards and safety regulations relating to fire and personal injury including provision of first aid boxes, assigned staff and use of accident book and report forms • elicit and record responsibility of employers and employees with regard to Health and Safety at work 	<ul style="list-style-type: none"> • flipchart • handouts: Copies of health and safety regulations including; safety in an electronic office; safety signs; examples of first aid equipment and procedures • assignments: Students to consider three possible accidents (e.g. member of staff falling down the stairs) and compile and complete any necessary report forms. Indicate how similar accidents could be avoided 	<ul style="list-style-type: none"> • use the local context of the school/college to examine regulatory requirements • a guest speaker can supply a variety of extra classroom materials • if a guest speaker is not possible, students could review Health and Safety in their place of study (or workplace) • much of this work has been covered in the standard module. Students who have not studied this module could be given an extra tutorial

Session Three			
1.2 2.1	<ul style="list-style-type: none"> • feedback on visits or surveys of Health and Safety undertaken in previous session • group to discuss and list findings of survey, shortcomings of survey and how the task could have been improved (possibly by more forward planning, preparation of checklists etc.) • students to prepare and word process a report on above aspects • students to prepare memo to all staff reminding them of general and/or specific office hazards and Health and Safety regulations • brainstorm specific/special regulations regarding the electronic office – use of VDUs, RSI, ergonomics • discuss how to implement, monitor and update the organisation's safety policy including staff induction and display of safety notices and procedures • checking and servicing of emergency equipment • provision of public address systems • short assignments 	<ul style="list-style-type: none"> • flipchart to record findings • handout: Example of well written, structured report preferably relating to Health and Safety • handout: Regulations regarding use of VDUs; how to avoid RSI; example of safety policy for workers in an electronic office • task: Preparation of a specific checklist of safety equipment; preparation of memo or letter requesting servicing or repair of emergency equipment 	<ul style="list-style-type: none"> • revise report writing – need to set out with title, date, for whom and by whom undertaken, introduction, findings, recommendations • a visit to another office to view specific areas e.g. the electronic office would be helpful

Session Four			
2.2 3.1	<ul style="list-style-type: none"> • short answer questionnaire on session one to three. Students to check answers with OHT, discussing alternative answers • discuss, in groups, the meaning of security. Group leaders to report back to whole class with tutor constructing definitive list • ensure the following aspects are covered – written material (implementation of Data Protection Act, computer security, on-screen data, use of passwords and encryption codes • for staff, visitors, contractors - use of identity badges, passes and closed circuit TV 	<ul style="list-style-type: none"> • flipchart • OHT • handout: Synopsis of Data Protection Act • assignment: Provide students with a scenario involving sensitive (secure) information and a possible break of security. Ask them to write a report establishing how and why it may have occurred and suggesting how future breaches could be avoided 	<ul style="list-style-type: none"> • a visit to another firm/office would be very useful to gain further knowledge of an organisation's security procedures • revise duties of reception staff including use of visitors' book, issue and return of passes • revise notations (e.g. confidential) used on paper documents and the secure storage of confidential information both manually and electronically

Session Five			
2.2	<ul style="list-style-type: none"> students to form small groups to work on a common assignment. This may take place over one or two sessions discuss necessity to plan who does what in the completion of the assignment and the need to set deadlines 	<ul style="list-style-type: none"> assignments – examples firm moving to new (larger) premises needs to implement safety and security methods firm experiencing lapses in security with serious consequences small firm needing information and regulations regarding Health and Safety and risk assessment 	<ul style="list-style-type: none"> each group could be given the same assignment and results compared or a different assignment could be given to each group so that feedback would result in extra discussion of findings and methods used ensure assignments set require the use of computers e.g. word processing to report findings etc.
Session Six			
2.2 3.1	<ul style="list-style-type: none"> report back on completed assignments general discussion on difficulties encountered and results achieved. brainstorm administrative procedures to deal with mail (manual and electronic) including storage and retrieval brainstorm record keeping – types of records, methods of storing discussion of purchase and supply of goods, use of manual and electronic methods of stock control, need for efficient procedures to administer systems 	<ul style="list-style-type: none"> flipchart visual aids – layout and organisation of mail room, stock room handout: Databases – use, construction, searches, updating etc. assignments: Creation and search of database. Provision of effective system of stock control for specific stock e.g. office supplies 	<ul style="list-style-type: none"> much of this work e.g. mail room, provision and procedures and stock control will have been studied at standard level. Those not having obtained standard level pass may need an extra tutorial or extra handouts students should be encouraged to take their own notes from brainstorming sessions

Session Seven			
3.2	<ul style="list-style-type: none"> • discuss types of administrative systems and procedures – suggested and prescribed • need to inform and consult with colleagues before developing new systems • need to agree objectives • need to examine procedures and observe tasks • use of staff interviews, questionnaires etc. to collect information • identifying costs of developing a new system • reporting to management, obtaining approval and implementing • in small groups decide on the type of procedures and instructions needed for a procedures manual for a new stock control system • create a flow chart and checklist of findings and report back to whole class 	<ul style="list-style-type: none"> • OHT • handout: Checklist on procedure to follow when developing new administrative procedures 	

Session Eight			
3.3	<ul style="list-style-type: none"> • revise implementing new or revised administrative procedures • whole class discussion to compile a list of methods used to implement procedures • discuss need to follow-up implemented procedure, to give additional support where necessary and monitor its effectiveness • discuss need to evaluate procedure when suitably established • possible need for staff training and methods of training • completion of short assignment 	<ul style="list-style-type: none"> • flipchart • handouts outlining methods of staff training (on the job and off the job); examples of support notes or training manuals • assignments revolving around scenarios in which new administrative procedures have been developed and need to be implemented and monitored 	<ul style="list-style-type: none"> • induction, checklists, calendars, training, support notes or manuals and follow-up support systems all need to be covered

Session Nine			
4.1 4.2	<ul style="list-style-type: none"> • brainstorm methods of obtaining information both internal and external • record and then classify the main sources of information • discuss how, having obtained information, relevant information can be selected, and organised • discuss need to check copyright requirements are met; whether information is/should be confidential • discuss methods of disseminating information to others – individually and collectively • short assignment 	<ul style="list-style-type: none"> • flipchart • OHT showing flow chart for selecting, collating, checking, organising and summarising information • handout of examples of effectively conveyed information e.g. charts – pie, bar, pictogram, tables, text – boxed and displayed • assignment: Students to collect information on given topic 	<ul style="list-style-type: none"> • primary and secondary research • use of Internet, intranet, websites, CD-ROM, videotext • use of library and reference facilities • use of publications – newspapers, magazines, leaflets, catalogues, brochures • use of Government publications • use of support agencies and local associations • presentation by means of photocopies, photographs, illustrations

Session Ten			
5.1 5.2	<ul style="list-style-type: none"> • discuss types and purpose of meetings both formal and informal – statutory meetings (e.g. AGM), extraordinary general meetings, committee meetings, ad hoc meetings, progress meetings, managerial meetings and working parties • need for documentation and procedure to be followed in formal meetings • discuss arranging meetings – administrative support required • discuss documentation required for meetings e.g. attendance book • discuss role of various participants including duties of officials e.g. chairperson • discuss/review terms used in meetings 	<ul style="list-style-type: none"> • handouts: Definition of various types of meetings, examples of notice of meeting with agenda • flipchart - to record checklist of tasks involved in arranging a meeting • handout - meeting terms defined 	<ul style="list-style-type: none"> • formal meetings e.g. board meeting • informal meetings (small group) e.g. departmental meetings • documentation and personnel involved • meeting terms – e.g. quorum, ex officio, addendum • selecting venue and providing facilities • provision of documents for use at meeting – minutes of previous meeting, back-up files, reports etc.

Session Eleven			
5.1 5.2	<ul style="list-style-type: none"> • as revision of previous session, students to prepare a notice of meeting and agenda and prepare a list of tasks to undertake prior to meeting • short question and answer session to test meeting terms • discuss minutes of meeting – recording, compilation, distribution and filing • assignment: students to prepare a set of minutes from brief notes 	<ul style="list-style-type: none"> • task sheet – details of forthcoming meeting • handout - a well structured copy of minutes of a meeting • task sheet – notes of recent meeting 	<ul style="list-style-type: none"> • verbatim notes – taking and transcribing • essential items in minutes • action minutes • it would be helpful to organise a role play of a meeting. alternatively students may be able to observe an actual meeting taking place

Session Twelve			
6.1	<ul style="list-style-type: none"> • discuss why business personnel need to travel, possible destinations and methods of transport (road - car/coach; rail; ferry; aeroplane) • use of diaries in planning trips • brainstorm choices to be made regarding travel; booking, confirmation, documentation, insurance • discuss use of travel agents, on-line booking services • short assignments on travel arrangements by rail and air using Internet booking • discuss other arrangements which may be necessary for foreign travel – passports, visas, visitor's permit, customs regulations • discuss methods of payment (credit cards etc) • discuss booking accommodation • discuss any special considerations e.g. local business conditions, climate, time zones, vaccinations • discuss information sources available e.g. Internet/intranet, CD-ROM, government and business information services, telephone and viewdata services 	<ul style="list-style-type: none"> • flipchart • access to Internet • handouts: Time-tables – road, rail, air; tickets • maps, brochures • examples of government and local business information available 	<ul style="list-style-type: none"> • students may need extra help in accessing and using on-line booking services or modes of travel with which they are not familiar

Session Thirteen			
6.1	<ul style="list-style-type: none"> • short assignments • discuss preparation of itinerary, use of checklists, confirmation of bookings • longer assignment including production of itinerary 	<ul style="list-style-type: none"> • short assignments – travel arrangements in-country and overseas • reference books, brochures, time-tables • assignment e.g. business executive visiting Africa for one week and visiting clients in South Africa (Cape Town, Johannesburg and Lesotho and Swaziland) 	<ul style="list-style-type: none"> • students may need help in displaying itineraries
Sessions Fourteen and Fifteen			
	<ul style="list-style-type: none"> • the final two sessions should be reserved for working on past CIE-set tasks or similar tasks set by tutor • students should be familiar with and work to specified time constraints • tutors should be available to assess work undertaken and give constructive criticism and assistance as required 	<ul style="list-style-type: none"> • sets of tasks as set by CIE or similar set by tutor 	<ul style="list-style-type: none"> • access to computer – Internet; software packages

Resources

Appleby, Modern Business Administration (6th Edition), 1994, Financial Times Prentice Hall, 0 273 602 829, Foundation to Advanced

Helen Harding, Office Organisation and Secretarial Procedures (2nd Edition), 1997, Longman, 0 582 308 585, Standard to Advanced

Helen Harding, Secretarial Procedures (3rd Edition), 1996, Financial Times Management, 0 582 298 911, Standard and Advanced

John Harrison, Office Procedures (4th Edition), 1996, Longman, 0 582 293 413, Foundation to Advanced

John Harrison, Secretarial Duties (10th Edition), 1996, Financial Times Management, 0 582 278 449, Standard to Advanced

Lucy Jennings, Secretarial and Administration Procedures (3rd Edition), 1999, Prentice Hall, 0 137 983 492, Foundation to Advanced

John Harrison, Secretarial Duties (10th Edition), 1996, Longman, 0 582 278 449, Foundation to Advanced

Lesley Jefferson, Sue Sealey, Administration Procedures for Higher Secretarial Diplomas, 1999, Heinemann, 0 435 455 133, Advanced

Margaret Nicholson, Administration, 1995, Thompson Learning, 0 333 601 05X, Foundation

Jon Sutherland and Diane Canwell, Business Administration for Secretarial Certificates, 1999, Heinemann, 0 435 455 559, Foundation to Advanced

Jardine and Shaw Caribbean Office Procedure, Hodder Headline Group, 2002 ISBN 0 340 76364 7 (pb)

Oliverio, Pasewark, White, The Office, South-Western Publishing Co. Cincinnati, Ohio 1993, ISBN 0-538-60900-1

Useful web sites: www.businessmeetings.com
www.ual.com
www.airtravel.com