

SQA Advanced Unit Specification

General information for centres

Unit title: Office Management

Unit code: HP6A 48

Unit purpose: This Unit introduces the essential skills required to effectively manage and organise an administrative environment. It would be suitable for candidates wishing to progress to a supervisory or managerial career within an organisation.

On completion of the Unit the candidate should be able to:

- 1 Manage and lead people and activities within the office environment.
- 2 Manage organisational change.
- 3 Manage and co-ordinate the recruitment and selection process.
- 4 Evaluate the role of training and development within the office environment.

Credit points and level: 2 SQA Credits at SCQF level 8: (16 SCQF credit points at SCQF level 8*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from National 1 to Doctorates.*

Recommended prior knowledge and skills: Access to this Unit is at the discretion of the centre. However, it would be beneficial if candidates have some competence in Office Administration. This may be demonstrated by possession of *Office Administration* (HP69 47) or equivalent, or recent relevant work experience.

Core Skills: The achievement of this Unit gives automatic certification of the following:

- ◆ Critical Thinking at SCQF level 6

There are also opportunities to develop aspects of the Core Skill of *Communication* at SCQF level 6 and the Core Skill component of *Planning and Organising and Reviewing and Evaluating* at SCQF level 6 in this Unit and these are highlighted in the Support Notes of this Unit specification.

Context for delivery: If this Unit is to be delivered as part of a group award, it is recommended that it should be taught and assessed within the subject area of the group award to which it contributes.

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Assessment: A holistic approach may be taken to the assessment of Outcome 1 and Outcome 2. A single instrument of assessment based on a case study of a real or imaginary organisation can be used. If the candidate is directed to gather information, the case study should ideally be based in an organisation that the candidate is familiar with, or one about which the candidate can easily gather data.

Since Critical Thinking at SCQF level 6 is embedded in this Unit, it is strongly recommended that you follow the assessment guidelines given. If you wish to use a different assessment model, you should seek prior moderation of the assessment instrument(s) you intend to use to ensure that the Core Skill is still covered.

An assessment exemplar has been produced to indicate the national standard of achievement required at SCQF level 8.

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Unit specification: statement of standards

Unit title: Office Management

Unit code: HP6A 48

The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory.

Outcome 1

Manage and lead people and activities within the office environment

Knowledge and/or Skills

- ◆ Decision making
- ◆ Operational planning
- ◆ Delegation
- ◆ Financial planning
- ◆ Budgetary control
- ◆ Leadership
- ◆ Employee motivation

Evidence Requirements

Candidates will need to provide evidence to demonstrate their knowledge and/or skills by showing that from a given scenario they can:

- ◆ Evaluate the complexity of strategic and operational levels of decision making by providing one example of an operational decision, one of a strategic decision and one other from either. Each example should explain whether the decision is structured or unstructured, whether the timescale is short or long term and whether it is low or high risk.
- ◆ Analyse the role of the Office Supervisor/Manager in the operational planning process, giving two examples from the office environment.
- ◆ Describe the process of financial planning and budgetary control in managing and leading within the office environment, providing three benefits and three barriers associated with each.
- ◆ Explain the delegation process, outlining two benefits of effective delegation and two barriers to achieving this. Give two examples of how these barriers can be overcome.
- ◆ Evaluate two leadership models currently adopted by the Office Manager which are based on a given scenario or situation, and determine their effectiveness in relation to employee motivation, operational goals and organisational efficiency.

Assessment Guidelines

Assessment may be based on a case study or workplace situation. Evidence may be presented in electronic or hard copy format. There may be opportunities to link Outcomes 1 and 2.

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Outcome 2

Manage organisational change

- ◆ PESTEL framework
- ◆ External environment
- ◆ Existing systems and services
- ◆ Managing resistance to change
- ◆ Strategies for effective change

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that from a given scenario they can:

- ◆ Apply the PESTEL framework to identify three potential opportunities and two potential threats to the organisation.
- ◆ Select two potential opportunities or threats to the organisation and discuss five changes within the office environment which could accommodate them.
- ◆ Explain five possible causes of resistance to change and their possible impact on the office environment.
- ◆ Explain three strategies to reduce employee resistance to change within the office environment.

Assessment Guidelines

The assessment for this Outcome may be combined with Outcome 1. The assessment may be based on a case study or workplace situation. Evidence may be presented in electronic or hard copy format.

Outcome 3

Manage and co-ordinate the recruitment and selection process

Knowledge and/or Skills

- ◆ Staff planning cycle
- ◆ Job analysis
- ◆ Job description
- ◆ Person specification
- ◆ Job advertisement
- ◆ Job interview
- ◆ Employment legislation

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that from a given scenario they can:

- ◆ Explain four key aspects relating to the planning cycle
- ◆ Design and produce a procedure for recruitment which meets employment legislation and can be used across an organisation
- ◆ Create a job description which comprehensively describes the job requirements and adheres to employment legislation.

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- ◆ Create a person specification which demonstrates a clear link to the job description identifying appropriate essential and desirable requirements
- ◆ Create a job advertisement which is consistent with legislative requirements and key areas relating to the job description and person specification
- ◆ Describe two advantages and two disadvantages of both one-to-one interviews and panel interviews

Assessment Guidelines

Evidence can be generated through assessments of a given case study or real life situation. Evidence may be presented in electronic or hard copy format.

Outcome 4

Evaluate the role of training and development within the office environment

Knowledge and/or Skills

- ◆ Induction
- ◆ Performance reviews
- ◆ Training needs analysis
- ◆ Training methods
- ◆ Evaluation of training

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that from a given scenario they can:

- ◆ Describe five areas of importance in the induction process
- ◆ Identify the role of performance review in relation to two of the under noted areas
 - Target setting and monitoring
 - Identify training needs
 - Plan future performance
 - Succession planning
- ◆ Evaluate two methods which can be used to identify training needs
- ◆ From a managerial perspective, evaluate two methods of 'off the job training' and two methods of 'on the job training'.
- ◆ Identify two methods which can be use to evaluate the effectiveness of training

Assessment Guidelines

The assessment for Outcome 4 may be integrated with Outcome 3.

There may be opportunities to assess the Outcome using VLE, hard copy or electronic copies, including audio and video, where appropriate. Candidates could produce evidence based on a simulated case study or an actual workplace situation.

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Administrative information

Unit code: HP6A 48
Unit title: Office Management
Superclass category: AF
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History of changes:

Version	Description of change	Date

Source: SQA

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Unit specification: support notes

Unit title: Office Management

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

Guidance on the content and context for this Unit

This Unit is designed to provide candidates with the knowledge and skills to effectively manage and organise an administrative environment in the role of Office Manager or Supervisor. This Unit may form part of a group award and may be delivered as a stand-alone Unit.

Guidance on the delivery and assessment of this Unit

Evidence for this assessment can be generated through a case study or a real work place situation.

Outcome 1

Candidates could examine a real organisation or hypothetical case study which allows them to describe and evaluate decision making at strategic and operational levels. The comparison between the two levels should focus on whether or not the decision will be structured or unstructured, the timescale will be short term or long term, and the risk high or low.

Examples of decisions at operational level could include:

- ◆ staffing requirements
- ◆ new equipment
- ◆ working practices
- ◆ new systems/procedures

Examples of decisions at strategic level could include:

- ◆ merger
- ◆ downsizing
- ◆ entering a new market
- ◆ producing a new product or service

The Office Manager has a role in communicating strategic plans and decisions to their team, then involving the team in development of an Operational Plan, including financial implications, agreeing the Operational Plan with senior managers and then ensuring it is implemented, monitored and evaluated.

The financial planning and budgetary control aspect of this Unit could be linked to the operational planning process, ie financial planning is linked to the operational plan because resources need to be agreed and allocated at this stage. Budgetary control can be included in the monitoring of the implementation of the operational plan.

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Advantages of budgeting

- ◆ targets are clearly defined
- ◆ co-ordination between the various departments are encouraged
- ◆ wastage of materials might be reduced
- ◆ enables managers to identify and respond to potential problems

Disadvantages of budgeting

- ◆ increase paperwork
- ◆ might be time consuming
- ◆ inflexible
- ◆ meet with resistance

Effective delegation is central to the role of the Office Manager and the candidate is required to explain the delegation process. Some examples are as follows:

- ◆ define the task
- ◆ select the individual or team
- ◆ ensure that the individual or team have the relevant skills and capacity to effectively complete the task
- ◆ outline the task
- ◆ define desired outcomes and results
- ◆ allocate applicable resources
- ◆ agree a SMART deadline

As part of Outcome 1 candidates are also required to explain some of the benefits associated with delegation which may cover the following:

- ◆ develop individuals
- ◆ groom potential successors
- ◆ increase organisational productivity and performance
- ◆ increase employee motivation
- ◆ foster and encourage trust between the manager
- ◆ allows the delegator to focus on other priorities
- ◆ saves time

Candidates should also consider some of the potential barriers to effective delegation and may explore some of the following:

- ◆ delegator insecurity
- ◆ delegator loss of control and lack of confidence in others
- ◆ lack of time
- ◆ lack of planning and prioritising
- ◆ lack of training
- ◆ poor understanding of individual roles and responsibilities.

Candidates are then required to explore some of the strategies which can be used to overcome barriers to effective delegation which may include the following:

- ◆ ensuring that the right person or team is selected for the task
- ◆ providing clear and unambiguous direction at the outset and when required
- ◆ providing support without heavy intervention
- ◆ allowing the delegate to complete the job in a self directed manner
- ◆ providing the necessary tools and resources to complete the task

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- ◆ providing timely and constructive feedback
- ◆ giving credit for good performance and milestones achieved

Leadership may take a range of forms including democratic, autocratic, collegial and laissez-faire. The candidate should be able to identify key characteristics and when various models would be appropriate or not. For example, which models may be appropriate in the context of:

- ◆ a mature team
- ◆ highly trained staff
- ◆ routine tasks
- ◆ where productivity is a priority

Candidates may identify whether the selected leadership style is appropriate and explain its impact on organisational efficiency.

Candidates are also required to discuss how the selected leadership style impacts on employee motivation and the following theorists may be considered:

- ◆ Herzberg
- ◆ McGregor
- ◆ Maslow
- ◆ Adams

Outcome 2

The Office Manager has an important role in the implementation of change. They are often required to act as facilitator, supporter and promoter of the change process. If candidates are able to examine the change process from start to finish then it is hoped that they will be more confident in their pivotal role as change agent.

Candidates are required to apply the Political, Economic, Social, Technology, Environmental, Legislative (PESTEL) framework to an organisation within a given case study or real life situation and draw conclusions from their analysis. They are required to identify potential opportunities and threats from their analysis and could be asked to select at least one affecting the office environment specifically and one affecting the organisation as a whole.

From this analysis the candidates would then examine two potential opportunities or threats in more detail and identify possible changes that may be required. For example:

- ◆ changes to existing systems and procedures
- ◆ new systems and procedures
- ◆ changes in working practices
- ◆ improve customer service

There are many causes of resistance to change and candidates may be encouraged to research the possible reasons behind perceived resistance and what actions managers might take in response to change.

Acceptance of change can be managed by recognising that resistance can exist for many reasons and that if taken seriously, strategies can be used to help reduce the resistance among employees.

Appropriate strategies could include:

- ◆ consultation
- ◆ regular meetings, both team and one-to-one

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- ◆ regular feedback
- ◆ training

Candidates may wish to support their findings and draw upon applicable models for analysing change. This may include Kurt Lewin's force field analysis.

Outcome 3

Rather than consider legislation as separate from the recruitment and selection process, it is envisaged that candidates will take a holistic approach and apply relevant legislation to each stage of the recruitment process to ensure that all necessary processes are non-discriminatory and comply with all necessary legislation.

In the same way that the operational plan is linked to the strategic plan of the organisation, the planning and managing of staff is also linked to the operational plan. It is important that Office Managers have a clear understanding of the staff planning cycle to ensure that the organisation's objectives are met in both the long term and short term.

A typical staff planning cycle includes corporate objectives and analysis of staffing demands compared with internal and external staffing supply. For internal staff, plans are required covering recruitment, training and development, career planning, pay and productivity, retirement and redundancy and performance review.

Candidates are required to design procedures and documentation required to recruit for a job role, ensuring that relevant legislation is adhered to. Candidates are also expected to describe advantages and disadvantages of one-to-one interviews and panel interviews. The following areas of current legislation should be taken into account although others may be relevant.

- ◆ Race Relations
- ◆ Employment Equality (Age) Regulations
- ◆ Disability Discrimination
- ◆ Sex Discrimination
- ◆ Equal Pay
- ◆ Employment Rights

Candidates could be encouraged to undertake independent research and given guidance regarding good practice in relation to appropriate referencing.

Outcome 4

In Outcome 4 candidates are required to describe key areas in the induction process, which may cover:

- ◆ Providing new employees with necessary information relating to health and safety.
- ◆ Introducing the new employee to company rules and procedures.
- ◆ Introducing the new employee to the culture of the organisation.
- ◆ Making the new employee feel part of the organisation.
- ◆ Introducing employees to key staff and/or mentors.
- ◆ Providing new employees with housekeeping information such as lunch times and facilities available.

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Candidates are also required to identify the purpose of performance review. It is envisaged that candidates demonstrate an understanding of the role of performance review in identifying training needs and development of employees.

Candidates may be introduced to a range of methods that can be used to identify training needs which may include some of the following areas:

- ◆ observation of work
- ◆ analysis of work product
- ◆ productivity levels
- ◆ internal and/or external customer feedback
- ◆ customer and/or staff questionnaires

Candidates will be required to evaluate different methods of on-the-job and off-the-job training and should be encouraged to consider the advantages and disadvantages of each method from a managerial perspective.

Finally, candidates are required to identify methods that can be used to evaluate the overall effectiveness of training which may include:

- ◆ questionnaires
- ◆ standard of work
- ◆ observation
- ◆ output
- ◆ effectiveness

Candidates may wish to draw upon theoretical frameworks pertaining to the evaluation of training such as Kirkpatrick's training evaluation model.

Opportunities for developing Core Skills

The achievement of this Unit gives automatic certification of the following:

- ◆ Critical Thinking at SCQF level 6

There are also opportunities to develop aspects of the Core Skill of *Communication* at SCQF level.

Candidates are required to produce complex information to a standard which would be acceptable in industry. Outcome 4 requires candidates to create and implement documentation relating to the recruitment and selection process. The Critical Thinking Core Skill component is developed where candidates deal with situations where variables may be complex or unfamiliar. Throughout the Unit candidates are required to evaluate given scenarios and situations by gathering appropriate evidence to support their evaluation. Based on the evaluation and analysis of a given situation or scenario, candidates reach conclusions and make recommendations which must be fully justified.

The Core Skill *Communication* at SCQF level 6

This Unit offers opportunities to develop Core Skills in *Communication* at SCQF level 6. Both oral and written communication can be developed during the teaching of this Unit through formative work which could involve an exploration through discussion, training videos and/or role play. During class discussions candidates should have opportunities to develop a high level of oral communication skills in questioning and responding to others. The Unit can also enhance reading skills as candidates are required to analyse source materials and can apply knowledge from text books, internet sites, and DVDs/CDs.

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Open learning

If this Unit is delivered by open or distance learning methods, additional resources will be required for candidate support, assessment and quality assurance. It would require planning by the centre to ensure the sufficiency and authenticity of candidates' evidence.

Equality and inclusion

This unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website www.sqa.org.uk/assessmentarrangements.

General information for candidates

Unit title: Office Management

This Unit is designed to enable you to explore the key concepts which underpin the role of the Office Manager. The Unit has four main areas which have been split into separate Outcomes. In the first Outcome you are required to explore the role of the Office Manager within the context of delegation, decision making, planning and the budgetary process. You will also look at different approaches to leadership and will evaluate how these may impact on employee motivation.

In the second Outcome you will examine the key concepts which underpin change management and you will analyse and apply the Political, Economic, Social, Technology, Environmental, Legislative (PESTEL) framework to a given case study or real life scenario. This Outcome also looks at 'resistance to change' and you will be required to identify some of the reasons why people resist change. You will also gain awareness of how to develop appropriate strategies to overcome resistance to change.

In Outcome three you are required to investigate the recruitment and selection process and you will gain an insight into the staff planning cycle. As part of the assessment for this outcome you will be required to create key documents which support the recruitment and selection process and you will learn of the importance associated with adherence to relevant legislation.

Outcome 4 will explore the key areas relating to training and development within the working environment. You will gain insight into the induction process and you will learn how to identify training needs within an organisational context. You will gain awareness of the performance review process and learn how this process can be used to identify training needs. You are also required to evaluate different methods of on-the-job and off-the-job training. Finally, you will explore the different ways in which to evaluate the overall effectiveness of the training.

For successful completion of this Unit, you will be required to achieve a satisfactory level of performance on the assessed work. To do this you will be expected to apply the concepts you have learned during the Unit and apply these to the given case study scenario or real life situation.

The achievement of this Unit gives automatic certification of the following:

- ◆ Critical Thinking at SCQF level 6

There are also opportunities to develop aspects of the Core Skill of *Communication* at SCQF level 6 and the Core Skill component of *Planning and Organising and Reviewing and Evaluating* at SCQF level 6 in this Unit.