

# Self Administration

National Occupational Standards

November 2009

Skills CFA  
6 Graphite Square, Vauxhall Walk,  
London SE11 5EE  
T: 0207 0919620  
F: 0207 0917340  
Info@skillscfa.org www.skillscfa.org

## Contents

No.	NOS Title	Page No.
CFASASA111	Manage and store your own information	1
CFASASA211	Communicate in a business environment	6
CFASASA212	Manage your own contacts	11
CFASASA231	Use IT to support your own role	16
CFASASA411	Plan and organise your own meetings	26
CFASASA421	Manage your own diary and travel arrangements	26
CFASAS111	Use office equipment to support your own role	31
CFASASD111	Plan and manage your own workload	36

---

### Overview

Use organisational systems to manage, research, store and present information.

Links: Self Administration

Specific skills:

1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. problem solving
7. organising
8. planning
9. quality checking
10. recording
11. using technology
12. presenting yourself

# CFASASA111

## Manage and store your own information

---

### Performance criteria

*You must be able to:*

#### **Use research and store information**

- P1 clarify the information you need for your work
- P2 access relevant information sources and manipulate databases where necessary
- P3 locate appropriate information efficiently
- P4 explore the relevant information, extracting the parts you need for your work
- P5 identify where information is relevant to other members of your organisation
- P6 organise and record the information in a way that will be useful to you and others
- P7 record your sources of information
- P8 store the information securely according to organisational procedures and in a way that will help you and others retrieve it in the future
- P9 safeguard confidential information

#### **Present information**

- P10 assess the reasons for reporting information, the intended audience, the timing, expected style and the equipment that you will need
- P11 prepare how you will report the information in a way best suited to the requirements
- P12 analyse and report the information clearly, logically and within agreed timescales
- P13 highlight the key points
- P14 deal with questions and suggestions to meet the enquirers needs
- P15 evaluate the outcomes of the report

### Knowledge and understanding

*You need to know and understand:*

#### **Use research and store information**

- K1 the purpose and benefits of being clear about what information you need to find before you begin a search
- K2 the main sources of information you can use when carrying out a search
- K3 the purpose and benefits of keeping a record of your sources
- K4 the relevant manual and electronic systems used in your organisation, for storing, organising and finding information and how to use these
- K5 how to explore information to find precisely the information that you need
- K6 how to identify information that will be helpful to others and why information sharing is important
- K7 how to organise and record information in a way that will be helpful to yourself and others
- K8 the purpose and benefits of storing information securely
- K9 what is confidential information and how you should handle it
- K10 why you should store information in a way that will help you and others find it in the future
- K11 how to store information in a way that will help you and others find it in the future
- K12 relevant legislation and your organisation's procedures for storing and retrieving information

#### **Present information**

- K13 the purpose and value of knowing the reasons for reporting information, intended audience, timings and expected style, including your organisation's house-style
- K14 the different formats in which you may be required to report information and how to prepare these as suited to requirements, including the equipment that you will need to use
- K15 how to report, analyse and evaluate information clearly and logically
- K16 the purpose of meeting timescales
- K17 how to identify and emphasise the key points in the information you are reporting and why this is important
- K18 how to deal with questions and suggestions effectively and why this is important
- K19 the purpose and benefits of evaluating the outcomes of the report

# CFASASA111

## Manage and store your own information

---

**Developed by** Skills CFA

---

**Version number** 1

---

**Date approved** November 2009

---

**Indicative review date** November 2011

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** Skills CFA

---

**Original URN** CFASASA111

---

**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for

## CFASASA111

### Manage and store your own information

---

work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

#### Suite

Self Administration NOS

---

#### Key words

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, presentation, confidential information, database, source, research, safeguard, questions, analyse

---

### Overview

Communicate by making sure that the `message' is delivered and received as intended.

Links: SAS / A212; and, SAS / A111.

#### Specific Skills:

1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. presenting yourself
7. problem solving
8. organising
9. planning
10. recording
11. using technology

# CFASASA211

## Communicate in a business environment

---

### Performance criteria

- You must be able to:*
- P1 communicate with other people to make sure the 'message' of communication has been delivered and received as intended
  - P2 select the most appropriate method of communication for the audience
  - P3 communicate clearly and coherently taking into account the needs of the audience
  - P4 safeguard confidential information
  - P5 give others the opportunity to ask questions and checking their understanding
  - P6 actively focus on information that other people are communicating, questioning any points you are unsure about
  - P7 make constructive contributions to discussions, developing points and ideas
  - P8 make sure that the communication has met its purpose
  - P9 present a positive image of yourself and your organisation

# CFASASA211

## Communicate in a business environment

---

### Knowledge and understanding

*You need to know and understand:*

- K1 the purpose and benefits of making sure that communication delivers the 'message' in which it is intended to be received
- K2 what methods of communication are available to you
- K3 your organisation structures, procedures and communication channels
- K4 the different audiences with which you might need to communicate and their needs
- K5 how to identify the appropriate methods of communication for different audiences
- K6 how to structure your communication so that it is clear and accurate
- K7 the purpose and value of empathising with your audience and adapt the way that you communicate to meet their needs
- K8 how non-verbal communication effects the impact you have on other people
- K9 how to interpret and respond positively to non-verbal communication
- K10 how to identify confidential information in line with your organisation's procedures
- K11 the purpose of safeguarding confidential information and how to do this
- K12 the purpose and benefits of giving other people the opportunity to ask questions and check their understanding and to respond positively to these
- K13 how to contribute constructively to discussions
- K14 how to focus actively on what others are communicating
- K15 how to evaluate the effectiveness of your communication and deal with situations where its purpose has not been achieved
- K16 the purpose and value of presenting a positive image of yourself and your organisation
- K17 the purpose and benefits for organisations to have a friendly and purposeful way of dealing with contacts
- K18 the types of contacts you deal with, the requirements that they have and how to meet their needs
- K19 types of problems that may occur with contacts – including conflict and aggression – and how to deal with these

# CFASASA211

## Communicate in a business environment

---

**Developed by** Skills CFA

---

**Version number** 2

---

**Date approved** November 2009

---

**Indicative review date** November 2011

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** Skills CFA

---

**Original URN** CFASASA211

---

**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support;

## CFASASA211

### Communicate in a business environment

---

Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

#### Suite

Self Administration NOS

---

#### Key words

communication, negotiation, planning ,organisation, presentation, recording, clients, customers, team members, information, colleagues, interpersonal skills, problem solving, audience, image, stakeholders

---

#### Overview

Make and receive telephone calls; deal with visitors or visitor for a colleague and your own post in the context of your job role.

Links: Self Administration

#### Specific skills

1. communicating
2. interpersonal skills
3. planning
4. organising
5. presenting yourself
6. quality checking
7. recording yourself
8. problem solving
9. using technology

# CFASASA212

## Manage your own contacts

---

### Performance criteria

*You must be able to:*

#### **Make and receive telephone calls**

- P1 make and receive calls following agreed procedures
- P2 exchange information with callers and record important points
- P3 take accurate messages and pass them on to the correct person
- P4 transfer calls to the correct person
- P5 present a positive image of yourself and your organisation
- P6 safeguard confidential information

#### **Deal with visitors**

- P7 identify visitors and the reason for their visit
- P8 present a positive image of yourself and your organisation
- P9 follow security and other agreed procedures
- P10 pass on information about the visitor's arrival, where appropriate
- P11 help visitors feel welcome and make sure their needs are met

#### **Deal with your own post**

- P12 receive and sort your own incoming post in line with agreed procedures
- P13 pass on information that may be of use to colleagues
- P14 prepare your own outgoing post in line with agreed procedures
- P15 prepare items for urgent or special delivery, identifying the best options for despatch
- P16 arrange for courier service to collect outgoing post, where appropriate
- P17 add correct postage charge to outgoing post
- P18 record post and postage costs in line with agreed procedures

## CFASASA212

### Manage your own contacts

---

#### Knowledge and understanding

*You need to know and understand:*

- K1 your organisation's procedures for making and receiving telephone calls
- K2 the purpose and value of knowing your organisational structure
- K3 how to locate the correct people / departments that you need to speak to
- K4 the purpose and value of projecting a positive image of yourself and your organisation
- K5 how to speak on the telephone when making business calls including how to address different types of people
- K6 the purpose and value of identifying a caller and their needs
- K7 how to use telephone equipment to transfer calls
- K8 how to take and relay messages accurately
- K9 what is confidential information, why it should be safeguarded and how to do
- K10 the purpose and value of security and other agreed procedures and your responsibilities for following these
- K11 your role in receiving visitors
- K12 the types of visitors you receive, the requirements that they have and how to meet their needs
- K13 communication channels within your organisation
- K14 types of problems that may occur with
- K15 the purpose and value of receiving visitors in a professional way
- K16 the purpose and value of passing on information that may be of use to colleagues
- K17 the range of internal and external post services available and how to choose the most appropriate postal service
- K18 agreed, security and other procedures for handling post
- K19 the purpose and value of following security procedures when handling post

## CFASASA212

### Manage your own contacts

---

<b>Developed by</b>	Skills CFA
<b>Version number</b>	1
<b>Date approved</b>	November 2009
<b>Indicative review date</b>	November 2011
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFASASA212
<b>Relevant occupations</b>	Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Transportation operations and maintenance; Construction, Architecture; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Media and communication; Publishing and information services; Preparation for life and work; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services
<b>Suite</b>	Self Administration NOS
<b>Key words</b>	communication, negotiation, planning ,organisation, presentation, recording, clients, customers, team members, information, colleagues, interpersonal skills, problem solving, audience, image, stakeholders, telephone, procedures, confidential, messages

# CFASASA231

## Use IT to support your role



---

### Overview

Handle files, edit, format and check information, search for and use email. This is based on the e-skills UK Areas of Competence export units: General Uses of IT and Use IT to exchange information.

Links: Self Administration

Specific skills:

1. communicating
2. organising
3. planning
4. problem solving
5. quality checking
6. recording
7. researching
8. using technology

# CFASASA231

## Use IT to support your role

---

### Performance criteria

*You must be able to:*

#### **Handle files**

- P1 use basic file-handling techniques for the software
- P2 use appropriate techniques to handle, organise and save files

#### **Edit, format and check information**

- P3 use basic editing techniques
- P4 check the accuracy of documents
- P5 use appropriate editing and formatting tools and techniques for more complex documents
- P6 use proof reading techniques to check that documents look professional

#### **Search for information on the internet or an intranet**

- P7 use a search engine to find and select appropriate information
- P8 use suitable techniques to make it easier to find useful information again (e.g. bookmarks or favourites) and to pass it on to others (e.g. sending web pages and web links via email)
- P9 keep records of where useful information came from
- P10 save the results of searches so useful information can be found again
- P11 choose a search engine that is appropriate for the information that is needed
- P12 carry out searches

#### **Send and receive e-mails**

- P13 use basic send commands
- P14 use basic reply commands
- P15 delete email
- P16 send and open emails with attachment
- P17 save attachments to appropriate places
- P18 find emails
- P19 follow any rules and guidelines for sending and replying to emails
- P20 use more advanced facilities
- P21 send messages to groups of people using groups set up in an address book
- P22 send and receive instant messages with and without attachments
- P23 compress messages on sending and uncompress messages that have been received
- P24 archive emails where necessary

# CFASASA231

## Use IT to support your role

---

### Knowledge and understanding

*You need to know and understand:*

#### **Purposes of using IT**

- K1 why the IT system and software that was used was appropriate for the task
- K2 why and how using the IT system and software was an appropriate way of carrying out the task

#### **Producing information**

- K3 who and what the information is for, where it will be used (e.g. on screen or hard copy) and when it is needed
- K4 how to produce information that communicates clearly and accurately with the audience, where and when it is needed

#### **Health and safety issues**

- K5 health and safety risks to self in using
- K6 health and safety risks to others from common hardware
- K7 what health and safety laws and guidelines affect the use of IT
- K8 ways to keep risks to people to a minimum
- K9 ways to keep risks to hardware to a minimum

#### **Email facilities**

- K10 what are email messages
- K11 how to use basic options to send, receive and reply to emails
- K12 how to send and receive attachments
- K13 how to use an address book
- K14 how to send emails to groups using a group list within an address book
- K15 how to archive and compress emails
- K16 what other resources may be provided by email software and how to use these

#### **Problems with Exchanging Information**

- K17 why some computer users may have difficulty in sending and receiving emails with attachments
- K18 what to do about emails from unknown users
- K19 what viruses are and the problems they can cause
- K20 how using anti-virus software can help to keep risks to a minimum
- K21 what risks there may be in downloading documents and software
- K22 risks in sharing information such as personal details
- K23 where and when to seek advice
- K24 what to do about emails intended to cause problems, such as SPAM or

# CFASASA231

## Use IT to support your role

---

chain-mails

K25 how to keep difficulties in sending and receiving large emails to a minimum

K26 what limits there may be to the number or size of emails that can be received or stored

K27 how to avoid viruses

### **Laws and Guidelines**

K28 what laws and guidelines affect the day-to-day use of IT, such as about Data Protection, Equal Opportunities, Disability, Health and Safety, copyright and guidelines set by your employer or organisation

K29 what and how different IT activities are affected by laws and guidelines, such as storing names and addresses, downloading images from the internet or sending inappropriate emails

# CFASASA231

## Use IT to support your role

---

**Developed by** Skills CFA

**Version number** 1

**Date approved** November 2009

**Indicative review date** November 2011

**Validity** Current

**Status** Original

**Originating organisation** Skills CFA

**Original URN** CFASASA231

**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education

# CFASASA231

## Use IT to support your role

---

and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

### Suite

Self Administration NOS

---

### Key words

reading, writing, communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, editing, accuracy, proof, check, professional, search, research, handle, save, techniques

---

### Overview

Make arrangements for meetings.

Links: Self Administration; SAS / A421

#### Specific skills

1. communicating
2. managing time
3. planning
4. quality checking
5. interpersonal skills
6. negotiating
7. presenting yourself
8. using technology
9. recording
10. organising

# CFASASA411

## Plan and organise your own meetings

---

### Performance criteria

*You must be able to:*

- P1 choose and organise appropriate location, equipment and catering requirements
- P2 check any costs associated with the meeting in line with your organisations procedures
- P3 invite people to the meeting asking for any special requirements
- P4 send out meeting agenda and any other related documents in good time before the meeting
- P5 arrange equipment, resources and layout of room
- P6 communicate health, safety and security procedures to attendees
- P7 make sure attendees needs are met
- P8 make sure notes or action points are recorded for circulation
- P9 record any comments on all aspects of the meeting for future reference
- P10 review feedback and identify learning points to improve future meetings

# CFASASA411

## Plan and organise your own meetings

---

### Knowledge and understanding

*You need to know and understand:*

- K1 procedures for agreeing appropriate meeting costs
- K2 the purpose and benefits of planning and organising meetings effectively and efficiently
- K3 the role of the person organising the meeting
- K4 types of meetings and their main features
- K5 the types of information that attendees will need
- K6 how to identify suitable locations for different types of meetings
- K7 the types of resources that will be needed for different types of meetings
- K8 special requirements that attendees may have and how to meet these
- K9 health, safety and security requirements when organising meetings
- K10 the purpose and benefits of taking notes for circulation
- K11 the purpose of recording any feedback about the meeting

# CFASASA411

## Plan and organise your own meetings

---

<b>Developed by</b>	Skills CFA
<b>Version number</b>	1
<b>Date approved</b>	November 2009
<b>Indicative review date</b>	November 2011
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFASASA411
<b>Relevant occupations</b>	Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education

# CFASASA411

## Plan and organise your own meetings

---

and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

### Suite

Self Administration NOS

---

### Key words

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, presentation, quality checking, procedures, invitations, equipment, layout, notes, comments ,agenda ,cost

---

### Overview

Manage your own diary and make your own travel and accommodation arrangements in line with your organisation's procedures.

Links: Self Administration; SAS / A411.

#### Specific skills

1. communicating
2. interpersonal skills
3. managing time
4. managing resources
5. negotiating
6. recording
7. organising
8. planning
9. problem solving
10. using technology

## CFASASA421

### Manage own diary and travel arrangements

---

#### Performance criteria

*You must be able to:*

- P1 assess the need for meetings, their purpose and possible alternative methods of dealing with business
- P2 make best use of your time by prioritising
- P3 make requests for meetings providing appropriate supporting information
- P4 identify and confirm optimum times and locations for meetings, avoiding conflicts
- P5 negotiate / renegotiate arrangements, where necessary
- P6 record, view and update diary entries regularly
- P7 make your diary available to colleagues
- P8 arrange your own travel and accommodation using the most efficient and cost effective means and in line with your organisations procedures
- P9 keep an appropriate record of travel, accommodation and other expenses
- P10 submit travel and accommodation expenses in line with your organisations procedures

# CFASASA421

## Manage own diary and travel arrangements

---

### Knowledge and understanding

*You need to know and understand:*

- K1 the purpose and benefits of managing own time and commitments to achieve desired results
- K2 methods of time and diary
- K3 how to identify when meetings or other events are necessary
- K4 other options to having meetings or other types of events
- K5 how to prioritise events and commitments
- K6 the purpose and value of making your diary available to colleagues
- K7 the types of travel arrangements and accommodation that need to be made and how to do make these
- K8 the optimum methods of travel and accommodation and organisational requirements for travel, accommodation and different types of expenses
- K9 the purpose and benefits of considering costs

## CFASASA421

### Manage own diary and travel arrangements

---

<b>Developed by</b>	Skills CFA
<b>Version number</b>	1
<b>Date approved</b>	November 2009
<b>Indicative review date</b>	November 2011
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFASASA421
<b>Relevant occupations</b>	Business, Administration and Law; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; Engineering and manufacturing technologies; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Media and communication; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; IT Service Delivery Occupations;

## CFASASA421

### Manage own diary and travel arrangements

---

Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Customer Service Occupations; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

#### Suite

Self Administration NOS

---

#### Key words

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, prioritise, diary, travel, arrangements, expenses, meetings

# CFASAS111

## Use office equipment to support your own role



---

### Overview

Use office equipment relevant to your role. This might include the photocopier, shredder, printer, binder or laminator.

Links: Self Administration

#### Specific skills

1. communicating
2. managing resources
3. managing time
4. negotiating
5. organising
6. quality checking
7. recording
8. planning
9. problem solving
10. using technology

# CFASAS111

## Use office equipment to support your own role

---

### Performance criteria

*You must be able to:*

- P1 locate and select equipment and resources you need
- P2 liaise with colleagues about the use of equipment
- P3 follow the manufacturer's operating instructions
- P4 maintain health and safety of yourself and others
- P5 waste as few resources as possible
- P6 follow agreed procedures for the disposal, reuse and recycling of waste
- P7 take prompt action when problems with equipment arise
- P8 report problems that you cannot deal with to the appropriate colleague
- P9 make sure the final product meets required standards and deadlines
- P10 make sure the equipment, resources and work area are ready for the next user

# CFASAS111

## Use office equipment to support your own role

---

### Knowledge and understanding

*You need to know and understand:*

- K1 different types of office equipment, their features and what they can be used for
- K2 how to choose equipment and resources appropriate for a range of administrative tasks
- K3 the purpose and benefits of following manufacturers' instructions when operating equipment
- K4 the purpose and value of making sure products meet quality standards and deadlines
- K5 the purpose and benefits of liaising with colleagues about the use of equipment
- K6 the purpose and benefits of keeping waste to a minimum and how to do so
- K7 the purpose and benefits of following manufacturers' instructions when dealing with equipment faults
- K8 the types of equipment and resource faults you are likely to experience, when you should deal with these and when you should refer them to the relevant person
- K9 the purpose and benefits of leaving equipment, resources and work area ready for the next user and what the appropriate standards are

# CFASAS111

## Use office equipment to support your own role

---

**Developed by** Skills CFA

---

**Version number** 1

---

**Date approved** November 2009

---

**Indicative review date** November 2011

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** Skills CFA

---

**Original URN** CFASAS111

---

**Relevant occupations**

Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for

# CFASAS111

## Use office equipment to support your own role

---

life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

---

### Suite

Self Administration NOS

---

### Key words

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, equipment, instruction, operation, product, problem, waste

---

### Overview

Prioritise and plan your work and manage your time effectively to meet objectives and deadlines.

Links: Self Administration

Specific skills:

1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. recording
7. organising
8. planning
9. problem solving
10. using technology

# CFASASD111

## Plan and manage own workload

---

### Performance criteria

*You must be able to:*

- P1 prioritise work according to its importance and urgency
- P2 plan work in line with objectives and deadlines
- P3 prioritise your time in line with your work plan
- P4 make sure all necessary resources are available
- P5 allocate estimated time-frames to each activity
- P6 keep appropriate records to monitor your work and make them available to others
- P7 liaise with and update others contributing to the work
- P8 adapt work plans to reflect changes in priorities
- P9 review and reflect on the outcomes of your plans and identify learning points to improve future work planning activities

# CFASASD111

## Plan and manage own workload

---

### Knowledge and understanding

*You need to know and understand:*

- K1 how to prioritise your workload and plan pieces of work according to their urgency and importance
- K2 how to identify when meetings are necessary and when other options are more appropriate
- K3 the purpose and benefits of planning your work load
- K4 the purpose and value of managing own time and commitments effectively
- K5 methods of time and diary
- K6 how to identify the resources available to you
- K7 how to select resources that are needed for your work
- K8 the purpose and value of working according to time-frames
- K9 the purpose and benefits of keeping records of your work and making these available to others
- K10 the purpose of keeping others updated with the progress of your
- K11 the purpose and value of being flexible and adapting work plans to reflect change
- K12 how to accommodate changes in your plans and renegotiate deadlines where necessary

# CFASASD111

## Plan and manage own workload

---

**Developed by** Skills CFA

---

**Version number** 1

---

**Date approved** November 2009

---

**Indicative review date** November 2011

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** Skills CFA

---

**Original URN** CFASASD111

---

**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Engineering and manufacturing technologies; Engineering; Manufacturing technologies; Transportation operations and maintenance; Construction; Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Crafts, creative arts and design; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services

# CFASASD111

## Plan and manage own workload

---

### Suite

Self Administration NOS

---

### Key words

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, objectives, deadlines, records, prioritise, work plans, liaise, meetings, identification, importance