



## NZQA Assessment Support Material

<b>Unit standard</b>	<b>29029</b>				
<b>Title</b>	Provide administrative services using business technology and systems				
<b>Level</b>	4	<b>Credits</b>	20	<b>Version</b>	1

### Note

The following guidelines are supplied to enable assessors to carry out valid and consistent assessment using this internal assessment resource.

Assessors must manage authenticity for any assessment from a public source, because students may have access to the assessment schedule or student exemplar material. Use of this assessment resource without modification may mean that students' work is not authentic. The assessor will need to change figures, measurements or data sources or set a different context or topic.

While this resource exemplifies written assessments, there are other assessment activities and approaches that could be taken.

1. See Generic Resources and Guidelines at <https://www.nzqa.govt.nz/providers-partners/assessment-and-moderation-of-standards/assessment-of-standards/generic-resources/>

### Assessor guidelines

For authenticity purposes, sample answers have not been provided. These will need to be provided by the Assessment developer.

### Context/setting

This assessment activity contains six assessment tasks in which you need to demonstrate your ability to provide administrative services using business technology and systems.

This assessment is in the context of a fictional business entity called Zirconi Bags and are available from the Business Administration and Technology assessment support material page. The evidence that learners provide for the assessment must meet the requirements of this entity.

## AWARD OF CREDIT



To be awarded credit for this unit standard learners must demonstrate their ability to provide administrative services using business technology and systems.

## CONDITIONS OF ASSESSMENT



This is an **open book assessment** that will take place over a timeframe set by you. Learners' answers must be in their own words.



You will provide learners with information regarding timeframes for this assessment.

### Assessment activity

This assessment consists of six tasks:

1. Coordinate a meeting.
2. Coordinate the purchase of equipment.
3. Work in a team task.
4. Deal with a customer query (role-play).
5. Give examples of behaviour.
6. Give examples of self-management.

### Resource requirements

- The following documents from the business entity:
  - Advisory\_committee\_outline.docx
  - Catering\_approved\_suppliers.docx
  - Company\_style\_guide.docx
  - Harrys\_CateringOrderForm\_individual\_items.docx
  - Harrys\_CateringOrderForm\_set\_menus.docx
  - Head\_office\_location.docx
  - Letter\_layout.docx
  - Meeting\_agenda.docx
  - Meeting\_arrangement\_process.docx
  - Meeting\_participant\_information.docx
  - Meeting\_request\_form.docx
  - Organisational\_chart.xlsx
  - Store\_locations.docx
  - Travel\_approved\_suppliers.docx
  - Travel\_request\_form.docx
  - Zirconi\_retail\_structure.docx
  - Zirconi\_background\_information.docx

- Zirconi\_logo1.jpg
- Zirconi\_logo2.jpg
- Zirconi\_logo3.jpg
- Zirconi\_logo4.jpg
- Access to a computer and the internet.
- For Task One you will need to play the parts of the committee members and engage in email communication with the learners.
- For Task Two you should recommend the supplier.
- For Task Three (team work), here are some relevant websites:
  - <http://www.vodafone.co.nz/business/mobile-plans/red-share-calculator/>
  - <https://www.spark.co.nz/business/shop/solution-tool/>
  - [https://www.2degreesmobile.co.nz/business/mobile/?gclid=CNaR9urYrNACFQgbvAodc\\_IB7q](https://www.2degreesmobile.co.nz/business/mobile/?gclid=CNaR9urYrNACFQgbvAodc_IB7q)

## Assessment Schedule

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ER	Task	Evidence	Judgement
ER 1.1 Business technology and software applications are selected and used to provide administration services in accordance with the requirements of the entity.  Range: services include co-ordination of:  meetings, diaries and schedules, travel, equipment purchase, financial information, projects, records management, web maintenance.	Projects  Task 1 Questions 1, 2	Project plan document  List of business technology and software applications that were used to coordinate the meeting.	Appropriate software application is selected and used for Project Plan (e.g. Microsoft Excel, Microsoft Project, Microsoft Access).  Software used is consistent with answer to Task 1 Question 2.  Project plan identifies actions required to ensure the meeting is organised as required by Zirconi bags.  Project plan identifies who is responsible for actions required and when actions need to be completed by.
	Travel  Task 1 Questions 1, 2	Travel itineraries  List of business technology and software applications that were used to coordinate the meeting.	Appropriate software application is select and used for Travel Itineraries (e.g. Microsoft Excel, Microsoft Word).  Software used is consistent with answer to Task 1 Question 2.  Travel itineraries identify traveller, and departure and arrival location and time.  Travel itineraries are consistent with Zirconi Travel Request Forms.

			Travel itineraries are consistent with solution given for Sandy in Task One Question 4.
Meetings Task 1 Questions 1, 2	Catering request form Agenda Meeting Request Form List of business technology and software applications that were used to coordinate the meeting.		Appropriate software application is selected and used to arrange meeting (e.g. Microsoft Word). Catering Request Form is completed for the meeting. Catering request meets requirement of \$15 per person for morning tea and \$25 per person for lunch. Catering request is consistent with dietary requirements of members of the advisory group attending. Agenda is consistent with Meeting Request Form. Details of Sandy's attendance and mode of attendance on Agenda (e.g. in person, not attending or attending via video conference) is consistent with solution given in Task One Question 4. Agenda document is in Zirconi Agenda template. Meeting arrangements are consistent with Zirconi Meeting Arrangement Process.
Diaries and schedules Task 1 Questions 1, 2	Copies of email communication with team members. List of business technology and software applications that were used to coordinate the meeting.		Appropriate software application is selected and used for email communication (e.g. Microsoft Outlook, gmail). Appropriate software application is selected and used for scheduling. (e.g. Microsoft Outlook). Software used is consistent with answer to Task 1 Question 2. Email communication is consistent with Zirconi Style Guide.

			Email communication is consistent with information given by assessor.
Equipment purchases Task 2 Questions 1, 2	List of equipment required to be purchased. Copy of email to John Wood listing. List of business technology and software applications that were used to coordinate the purchase of the equipment.		Appropriate software application is selected and used to find equipment prices (e.g. Google Chrome, Mozilla Firefox). List of equipment required is appropriate in terms of the requirements of a new staff member. Product codes and prices for equipment outlined in email to John are consistent with website of supplier name provided by assessor. Content of email to John is consistent with prices from supplier's website.
Financial information Task 3 Question 1	Software application showing costs for the four components of the plan. Report for Operations Manager summarising findings and making recommendation on which company and plan Zirconi should choose.		Appropriate software application selected and used to show costs of components of plan (e.g. Microsoft Excel, Microsoft Project). Report contents are consistent with costs outlined in software application.
Records management, web maintenance Task 4 Question 1	Assessor verification from conversation with 'manager' about price discrepancy issue and recommended improvements.		Appropriate business technology is selected and used to speak to their 'manager' about the price discrepancy issue (e.g. landline, mobile phone). Recommended improvement to records management is likely to resolve the issue. Recommended improvement to web maintenance is likely to resolve the issue.
			<b>Sufficiency requirement for ER 1.1:</b> <b>All of Tasks 1 to 4 are required to be correct.</b>

ER 1.2 Administration systems and processes are regularly reviewed to ensure they meet business entity requirements and areas for improvement recommended.	Task 4 Question 1	Assessor verification from conversation with 'manager' about price discrepancy issue and recommended improvements.	Recommended improvement to records management will ensure these administrative systems meet the requirements of Zirconi Bags.  Recommended improvement to web maintenance will ensure these administrative systems meet the requirements of Zirconi Bags.
ER 1.3 Communication with stakeholders in the provision of administration services is effective in terms of the intention, medium, and audience.  Range communication – written, and oral with both internal, and external stakeholders to the entity	Task 1 Question 1	Email communication with team members (ER 1.3, written, internal)  Email communication with John Wood (ER 1.3, written, internal)  Email communication with committee members (ER 1.3, written, external)	Communication with team members was clear and provided the information required.  Communication with committee members was clear and provided the information required.  Communication with John Wood was clear and provided the information required.  Email correspondence consistent with answers to Task 1 Q3.
	Task 1 Question 3	Completed table (ER 1.3, oral and written, internal and external)	Stakeholders identified.  Intention, medium and audience are clear.
	Task 2 Question 1	Email communication with John Wood (ER 1.3, written, internal)	Communication with John Wood was clear and provided the information required (product codes and descriptions).
	Task 3 Question 1	Report for operations manager (ER 1.3, written, internal).	Report for operations manager was clear, provided a summary of findings and a recommendation for the best plan.
	Task 4 (role play)	Verification that oral communication with external stakeholders was effective.	Comments given confirm ability to communicate effectively.



		Verification that oral communication with internal stakeholders was effective. (ER 1.3, oral, internal and external).	<b>Sufficiency for ER 1.3: communication must be both written and oral, with both internal and external stakeholders.</b>
ER 1.4 Customer service techniques are selected and applied in the provision of administration services that meet stakeholder expectations.	Assessor verification Question 4	Verification that the learner selected and applied appropriate customer service techniques for the situation.  Comments on two techniques used during the role play.	Techniques applied must be suitable for the situation and the entity.
		Verification that the techniques applied met stakeholder expectations.  Comment on how the techniques used met stakeholder expectations.	Comment must show that the learner addressed any questions or concerns of the customer or staff member.
ER 1.5 Administration services are provided by working with team members to meet team objectives.	Task 3 Question 1	Excel spreadsheet showing costs for the four components of the plan for the three companies being compared.  Report for the Operations Manager <ul style="list-style-type: none"> <li>▪ summarising the team's findings</li> <li>▪ making a recommendation on which company and plan Zirconi should choose.</li> </ul>	Calculations of the number of people requiring different features of the plan is consistent with the company's Organisational Chart.  Recommendation in report <ul style="list-style-type: none"> <li>▪ is cost effective</li> <li>▪ is consistent with information displayed in Excel spreadsheet</li> </ul> References are given for the information included in the Excel spreadsheet and report.
	Task 3 Question 2a	Description of tasks each member had in the project.	Description is consistent with the spreadsheet and report.
	Task 3 Question 3	Two examples of how learner helped their team come up with the report and recommendations.	Two examples given by team member confirming that learner worked with team to meet objectives.
	Task 3 Question 3	One example of how learner behaved professionally in the team task.	Example given by another team member confirms that learner's behaviour met requirements.
	Task 3 Question 3	One example of how learner behaved in socially and culturally appropriate way during team task.	Example given by another team member confirms that learner's behaviour met requirements.



ER 1.6 Behaviour is professional, ethical, and socially and culturally appropriate for the provision of business administration services.	Task 5	Examples of how learner demonstrated each of the types of behaviour.	Examples confirm that learner's behaviour met requirements.
	Assessor Verification	<p>Verification that the learner's interactions were professional with comment.</p> <p>Verification that the learner's interactions were ethical with comment.</p> <p>Verification that the learner's interactions were socially appropriate with comment.</p> <p>Verification that the learner's interactions were culturally appropriate with comment.</p>	Comments given by verifier confirms that learner's behaviour met requirements.
ER 1.7 Problem-solving and decision-making techniques are applied in the provision of administrative services to meet stakeholder needs and requirements of the entity.	Task 1 Question 4	<p>Explanation of the action that would be taken to solve the problem.</p> <p>Verification that the learner applied problem-solving and decision-making techniques, with a comment.</p>	<p>Explanation confirms that learner can apply problem-solving and decision-making techniques to meet stakeholder (Sandy) needs and requirements of the entity.</p> <p>Comments given by verifier confirms that learner solved a problem and made a decision.</p>
	Assessor Verification		<p><b>Sufficiency for ER1.7: Require both Task 1 Q4 and assessor verification correct.</b></p>

<p>ER 1.8 Self-management contributes to the provision of administration services and the achievement of the entity's operational requirements.</p> <p>Range self-management includes being proactive and may include – time-management, goal setting, prioritisation, consultation, reliability, task follow-up, self-assessment/reflection on performance, managing progress; evidence of five is required.</p>	Proactive Assessor verification Question 3	Verification that the learner was proactive with comment. (ER 1.8, proactive)	Example given confirms learner was proactive.
	Proactive Task 6 Question 1	Trainee description of how they were proactive, with an example.	Example given confirms learner was proactive.
	Task follow-up Task 3 Question 2b	Explanation of how learner followed up on tasks assigned in the group.	A full explanation of how the learner followed up on assigned tasks must be given.  Explanation must <ul style="list-style-type: none"> <li>▪ be consistent with the spreadsheet and report</li> <li>▪ show the learner followed up on tasks that contributed to the completion of the report.</li> </ul>
	Managing progress Task 3 Question 2c	Explanation of how the learner managed their progress on their assigned task.	A full explanation of how the learner followed up on assigned tasks must be given.  Explanation shows the learner organised the work for the task to meet timelines required by the team.
	Consultation Question 2d	Example of how the learner consulted with others during the project.	Example shows that the learner's use of consultation contributed to the completion of the report.  Example is consistent with the task and the process.
	Self-assessment / reflection on performance Question 2e	One example of what the learner would do differently the next time they are engaged in teamwork, with explanation	Example and explanation show learner has reflected on their performance as part of a team.
	Reliability Question 3	Team member's assessment of reliability with example.	Assessment of reliability and example show the learner's reliability contributed to the completion of the report.

Time-management, prioritisation Task 1 Question 1	Project plan	Project plan confirms learner can manage their time and prioritise tasks.
Managing progress Task 1 Question 1	Email communication with John Wood.	Regular communication with updates confirms learner can manage progress.
Self-assessment / reflection Task 4 Question 2	Statement of whether learner felt satisfied with their overall performance in the roleplay. Two reasons why they were or were not satisfied, with explanation given.	Must state whether they were satisfied or not with their performance. A full explanation of the reasons why the learner felt satisfied with their performance in the role play must be given.
Task 6	Example of how learner showed two attributes of self-management. (other than proactivity)	Examples and comments given confirm relevant attributes.
Assessor Verification	Verification that the learner used their time appropriately with comment. (ER 1.8, time-management). Verification that the learner prioritised the tasks required during the assessment. (ER 1.8, prioritisation). Verification that the learner consulted with others as required during the assessment. (ER 1.8, consultation) Verification that the learner followed up on tasks assigned to them. (ER 1.8, task follow-up).	
		<b>Sufficiency for ER 1.8: must have evidence of proactivity AND 4 of the listed attributes.</b>

Final grades will be decided using professional judgement based on a holistic examination of the evidence provided against the criteria in the unit standard.