

Observation Record	
Unit(s) to be Assessed (Insert Unit Number(s) and Titles(s))	220 250 311 320 350

PLEASE NOTE: All names in this record have been changed - for ease of reference, Catriona is now the candidate and Mary is her manager.

NAME: Catriona Brown

Skills/Activities Observed

I carried out a direct observation of Catriona's skills in relation to the above units on Monday 25th March 2019 at Hayfield House, Lerwick. Catriona works as a Business Support Officer. Catriona works closely with others in order to ensure Shetland Islands Council – Children's Services works effectively to meet the needs of the organisation and its internal and external customers. Catriona's Line Manager is Mary Smith. Catriona works closely with Mary to ensure the efficient running of the Department.

Part of Catriona's daily duties is to meet and welcome visitors into the department. I asked Catriona about the types of visitors that she deals with. Catriona stated that visitors vary. Today she is expecting a number of people to visit who are attending the department for interviews.

When visiting Catriona today I entered the main reception area. I stated who I was there to see, I was asked to sign the visitor logbook. The receptionist then called Catriona, who came down to reception promptly to meet me. She was very polite and engaged in conversation. She then escorted me upstairs to her office. She used her fob key to open the secure doors. Catriona is fully aware of the importance of being friendly and welcoming to visitors so that they feel at ease. This is important as it presents a positive and professional impression of the organisation. Catriona always ensures that visitors are not left to make their own way around the building, this links to the SIC Code of Conduct policy doc ref 10, Data Protection doc ref 12. Catriona stated that Mary conducts lots of small meetings in her office, when these visitors arrive Catriona will escort them up to Mary's room. She will ask them if they would like a cup of tea or coffee, Catriona will ensure that they are comfortable. She will assist Mary with any additional admin related activities for example Mary may need paperwork photocopied, or ask for a telephone number etc. When this happens Mary's requests will be Catriona's immediate priority. Catriona uses a shared online diary system, she can therefore check each day, what visitors are expected, and prepare for them as required. Catriona is aware of the importance of identifying visitor's reason for their visit. Most visitors into the department are expected. Therefore preparing administration tasks before the visitors arrive ensures efficiency, and the smooth running of their visit. (250 P1, P2, P3, P6, P7, K1, K2)

Catriona works in a shared office, the staff work well together, from time to time, they ask one another questions in order to ensure admin duties are carried out to the required standards. Catriona has been working within the department for approximately 5 months. She has settled well into her position, and she is confident and competent within her role. Now and again, she will clarify information and requirements if she is not sure, or if she has not completed a particular task before. This is good practice as it ensures that Catriona is checking and understanding requirements prior to completing activities. This ensures accuracy and high standards are maintained. By working closely with others she is benefiting from her colleagues, knowledge and experience to help develop her skills. Staff members share office equipment including a shredder, photocopier and printer.

Catriona has a large desk with a Laptop and telephone. All equipment was clean and hygienic. Catriona's desk was well presented. Catriona used all equipment in line with Health & Safety standards (doc ref 16) and within the guidelines of equipment manuals. (220 P1, P2, P4, K4)

Catriona's work activities includes the following:

- Telephone for answering calls
- Laptop for typing letters, printing, checking emails, checking diaries etc
- Shredder for destroying confidential documents that were no longer required.
- Photocopying interview paperwork (220 P1, K1, K2)

While observing Catriona she printed a number of different documents in preparation for interviews that were taking place in the afternoon. Catriona received an email from Malcolm Wilson who asked Catriona to prepare all the necessary paperwork for the interviewees. Catriona opened the email, she read the content, and she then got her hand written procedure that she uses for dealing with interview preparations. She then started adding the candidates' names to the documents printing the required number of copies. While printing the copies one of the documents printed A5 rather than A4, the text was very small and unusable. Catriona returned to her desk, she checked the Adobe settings but she could not find anything wrong. She then went into the printer settings, she clicked on the size option, and she then changed the size to A4. She reprinted the document. Catriona then stapled each candidates paperwork together. She then placed the paperwork in a folder which she passed to her colleague Kate who was attending the interviews. Catriona was fully aware of the timescale for the required documentation, she ensured that paperwork was complete well within the deadline. When Catriona had finished using the printer/photocopier she set the photocopier back to default settings ready for the next user. (220 P1, P2, P5, P7, P8, P9 K1, K2, K4, K7)



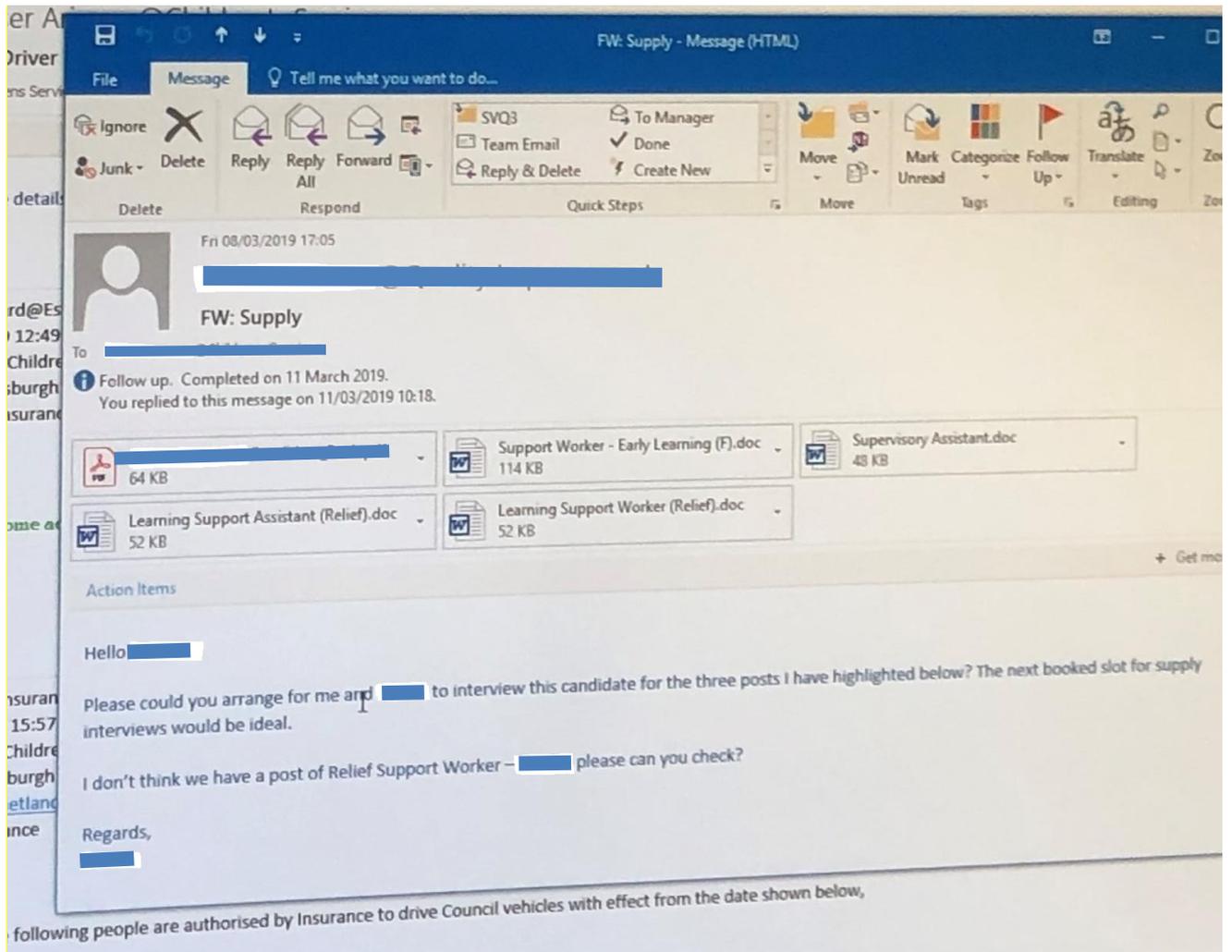
Photograph of Catriona preparing interview paperwork on her laptop. (220 P1, K1, K2)



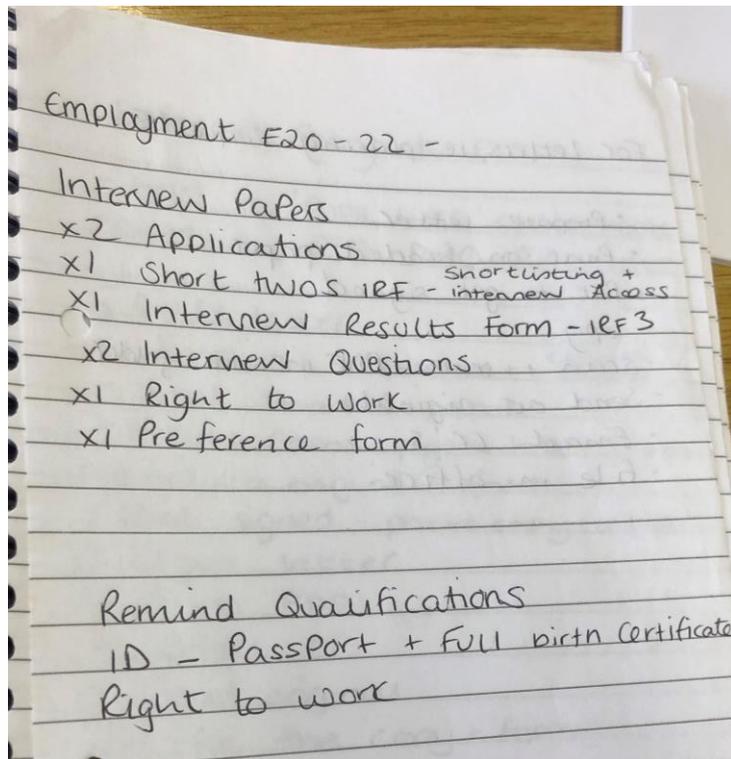
Photograph of Catriona collating printed documents on the photocopier/printer. (220 P1, K1, K2)



Photograph of Catriona shredding the interview paperwork that printed A5 rather than A4, because the paperwork was confidential Catriona ensures it was destroyed in line with SIC procedures. (220 P1, K1, K2)



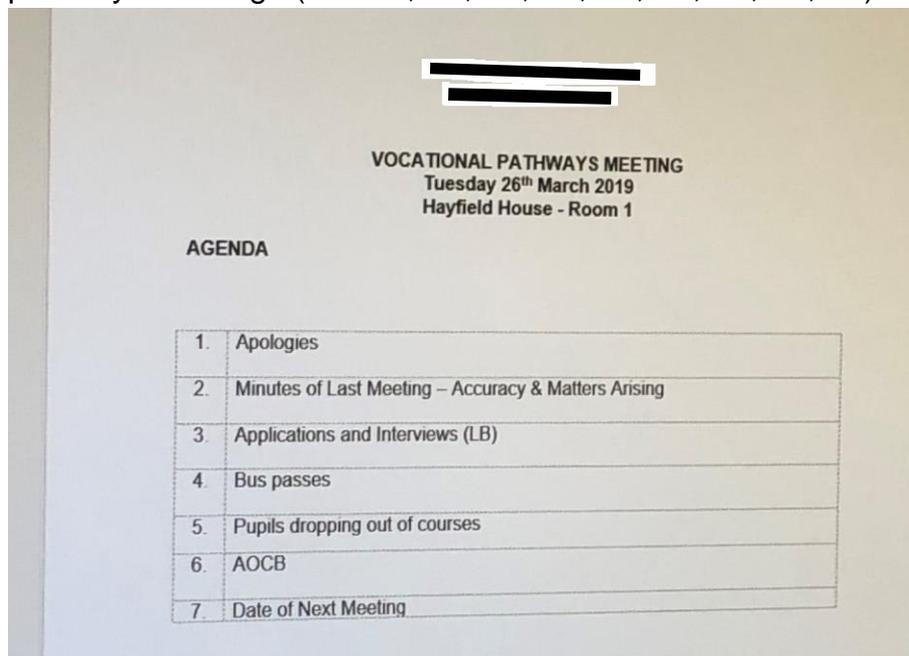
Above is a screen print of the email Malcolm send to Catriona regarding the interviewees that will be attending interviews for supply jobs on 25/03/2019. Catriona confirmed that she had booked a suitable meeting room for the candidates. Further details regarding this are described on page 2) (350 ST2.2) (220 P1, P2, P7, P8, K1, K2, K4)



Opposite are Catriona's: preparing for interview paperwork notes. I observed Catriona using these notes while preparing and printing documentation for the supply interviews described above.

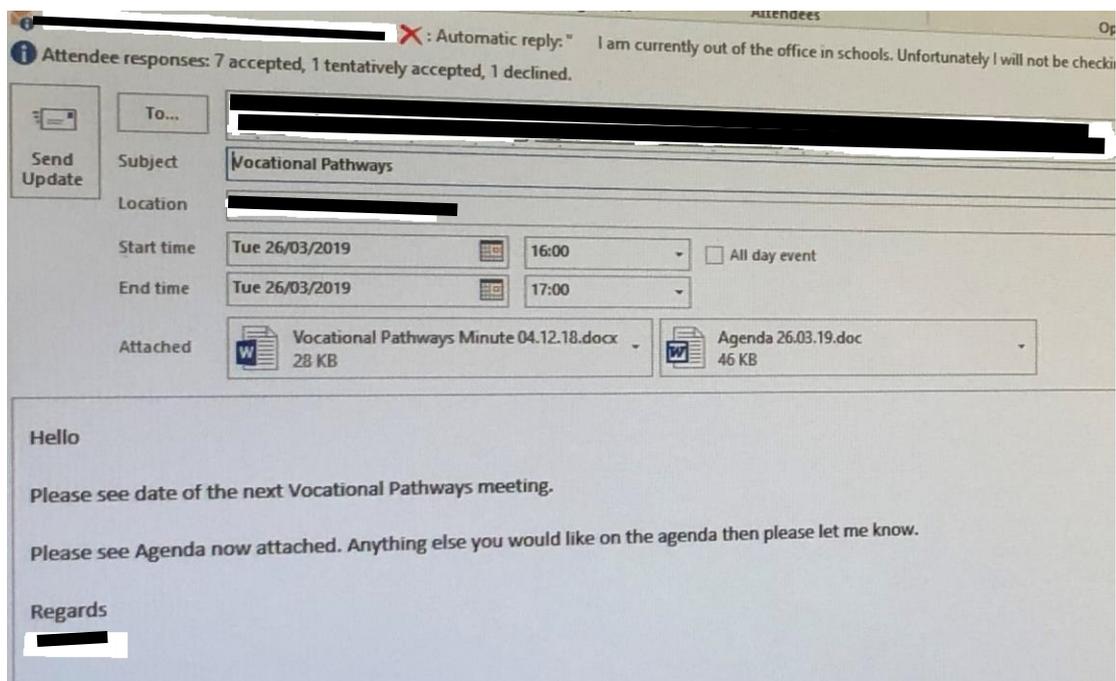
You can view three short videos of Catriona preparing and printing documents for the supply interviews within her evidence folder: doc ref 35, 33, 31

Another duty that Catriona carries out regularly is organising and co-ordinating meetings. This involves booking meeting rooms, creating agenda's and preparing other meeting documentation. Sending out meeting invitations via Microsoft Outlook, collating responses and preparing meeting rooms. Catriona always takes time to fully identify the meeting brief, so that she can plan, and prepare for each meeting effectively. Rooms are booked via reception. Catriona showed me an agenda she had prepared for a vocational pathways meeting. (320 P1, P3, P4, P5, K1, K2, K4, K6, K8)

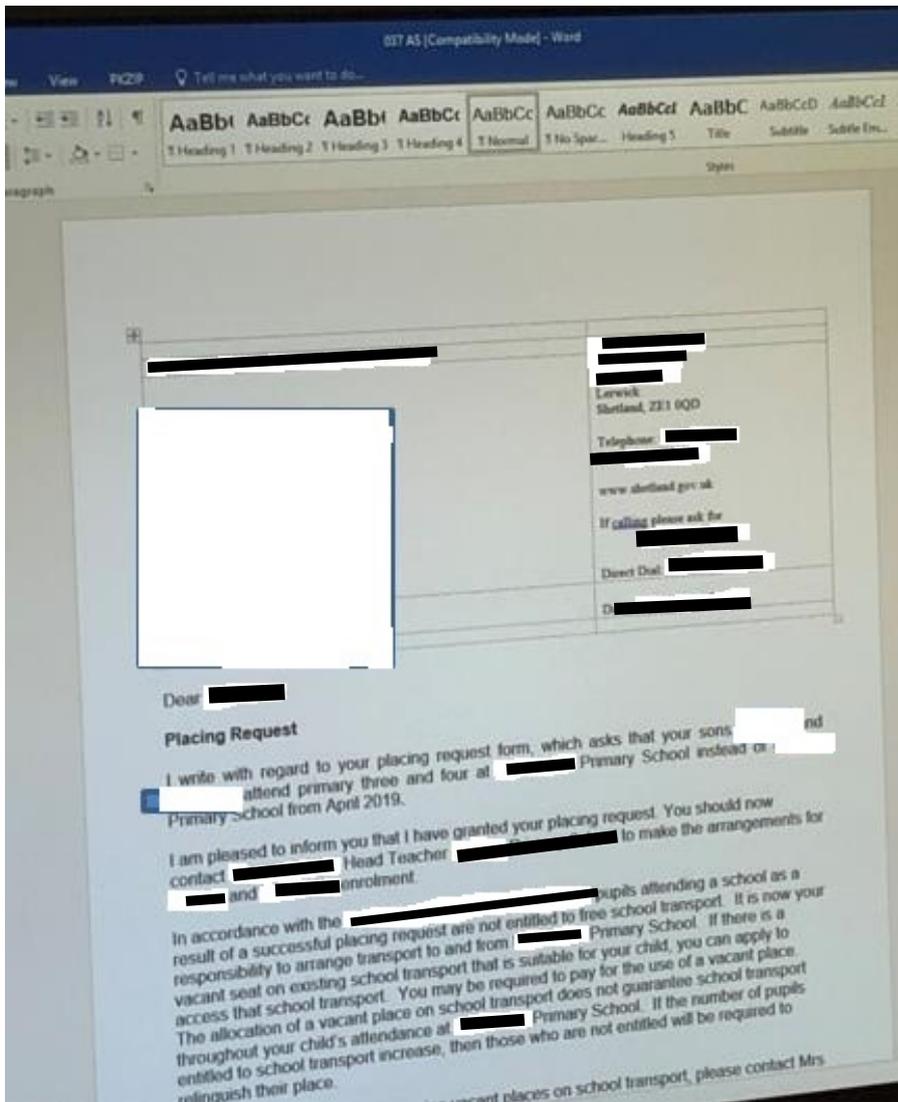


Catriona prepared the agenda using Microsoft Word as per agreed requirements; Catriona used a template to ensure standardisation of documentation. She identified, and prepared the required resources, she researched and organised the content, and made efficient use of technology. She designed the document in the agreed style, she checked the accuracy of the document prior to saving it in the shared network drive. (311 P1, P1, P3, P4, P5, P8, K2, K3, K5, K7, K10). (220 P1, K1, K2)

Catriona showed me the meeting invitation, which she created and sent via Microsoft Outlook within the required deadlines. All attendees email addresses were entered via the email address book; Catriona entered all information needed including the meeting time, location, and previous minutes. (350 ST1.1, ST1.2, ST1.3, ST2.1) (220 P1, K1, K2) (320 P3, P4, P5, K1, K4, K6, K9)

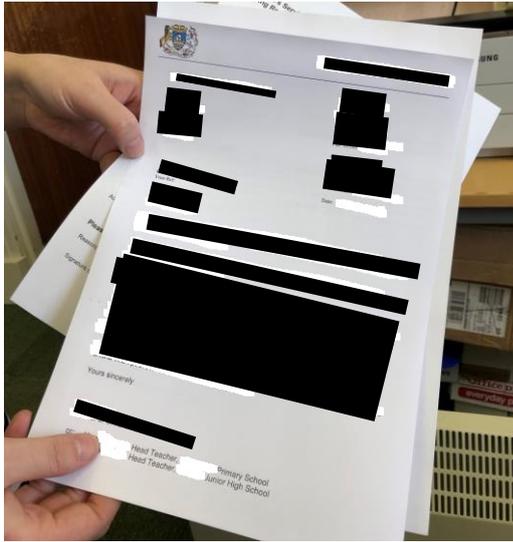


During my visit, I observed Catriona typing up a letter for a parent who had requested that her two sons attend a primary school that was out with their catchment area. The reason for the requested change was because the mother has taken up a new job at Bay View Primary School. She therefore felt it would be more practical for her sons to attend the same school. This will help her to co-ordinate transport more effectively. Catriona located all of the relevant paperwork requesting the change. She identified the relevant information; she then opened up a template letter and made the required changes to the document. You can view a short video of Catriona creating the document which is shown below: (doc ref 34)



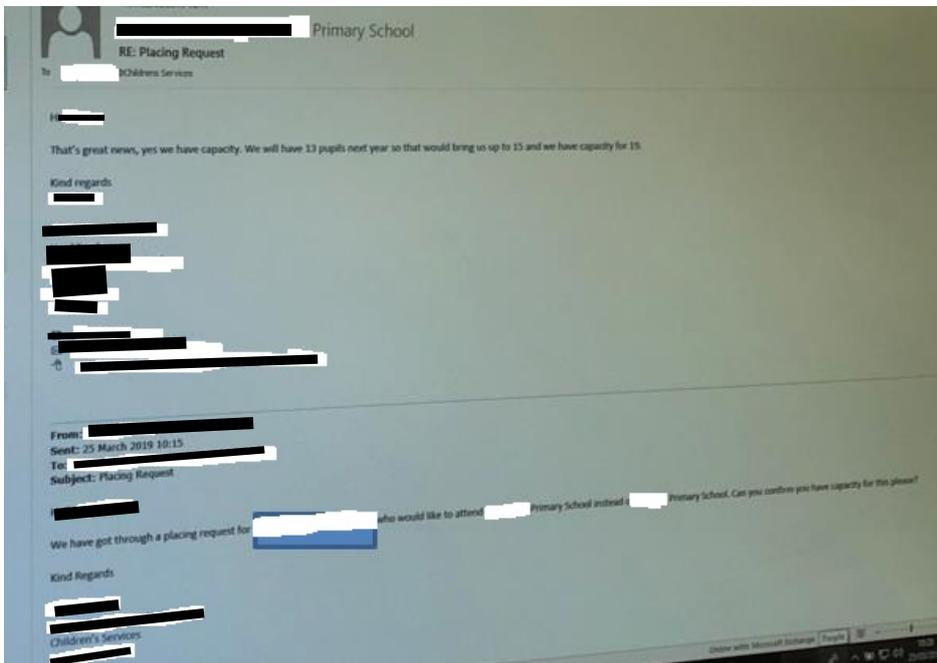
(311 P1, P2, P3, P4, P5, P10, K2, K3, K5, K7)





Photograph above shows Catriona printing the placement letter described on page 5 on headed paper. The completed letter is shown opposite.

(220 P1, P2, P7, P8, K1, K2, K4)

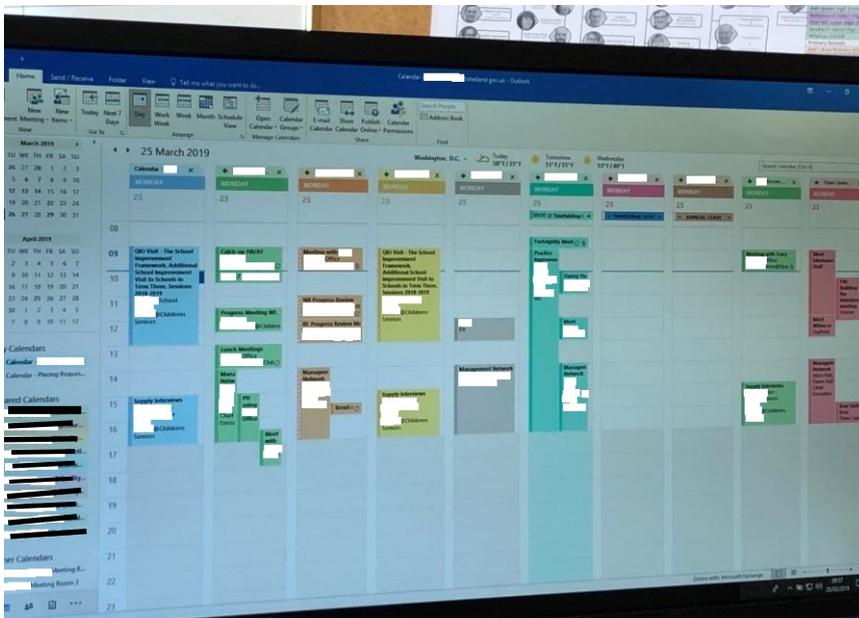


Email sent to Rachel including her reply regarding the two new pupils. (350 ST1.1, ST1.2, ST2.1, ST2.2)

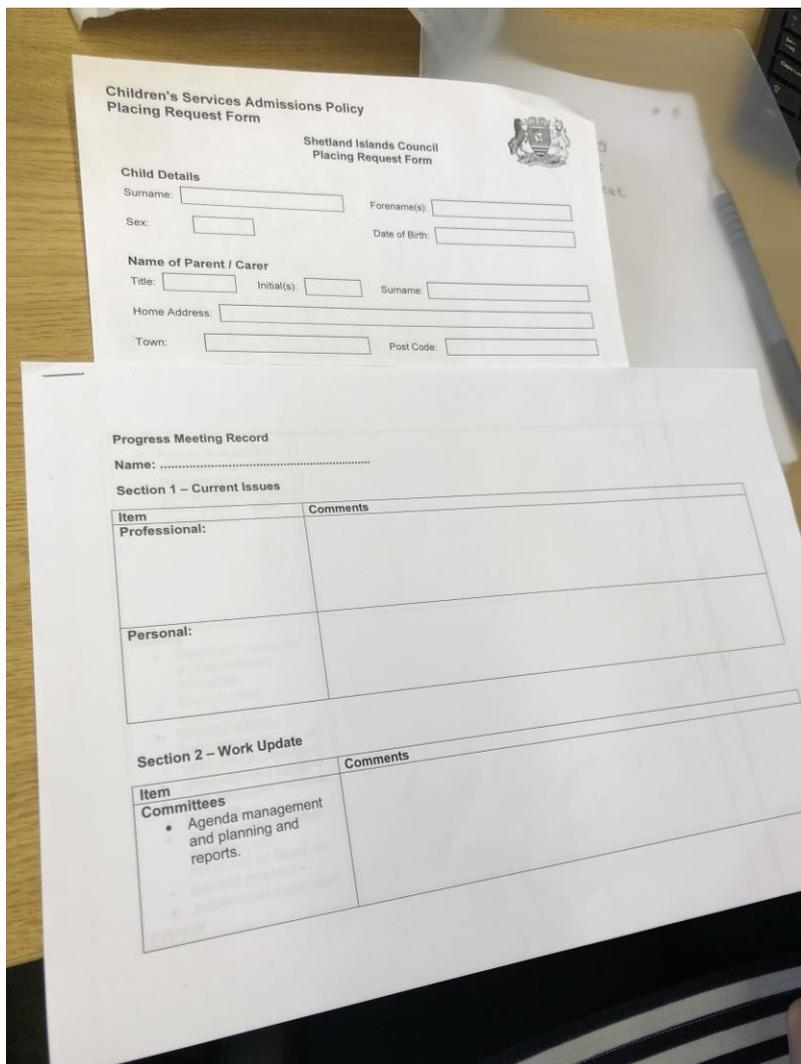
DD6 8DE While Catriona was busy carrying out her morning admin duties, her telephone rang. Catriona answered the call in a polite and helpful manner. She took time to listen to her caller, to identify their needs. The caller wanted to talk to one of Catriona's colleagues. Catriona looked at her shared Outlook diary (shown below) to see where her colleague was located. She confirmed that her colleague was unavailable all day. The caller stated that they would call back another time. See video of Catriona handling the call (doc ref 32) (220 P1, K1, K2)



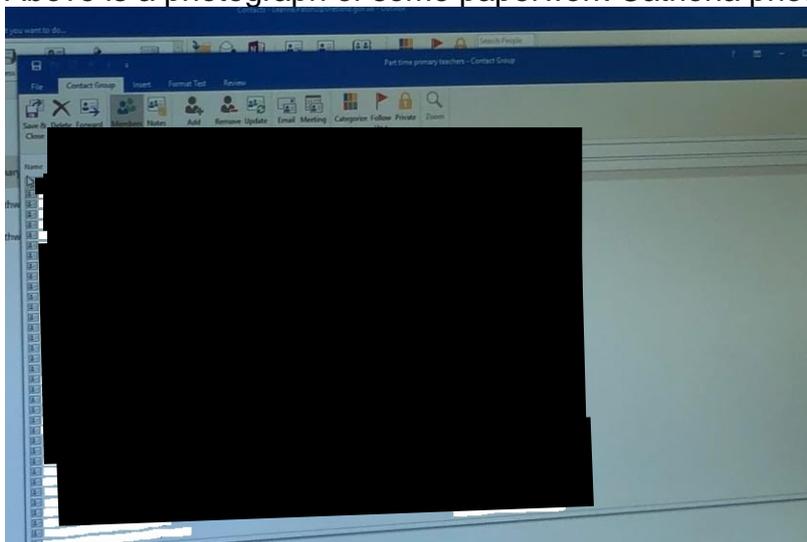
Catriona handling an incoming call.



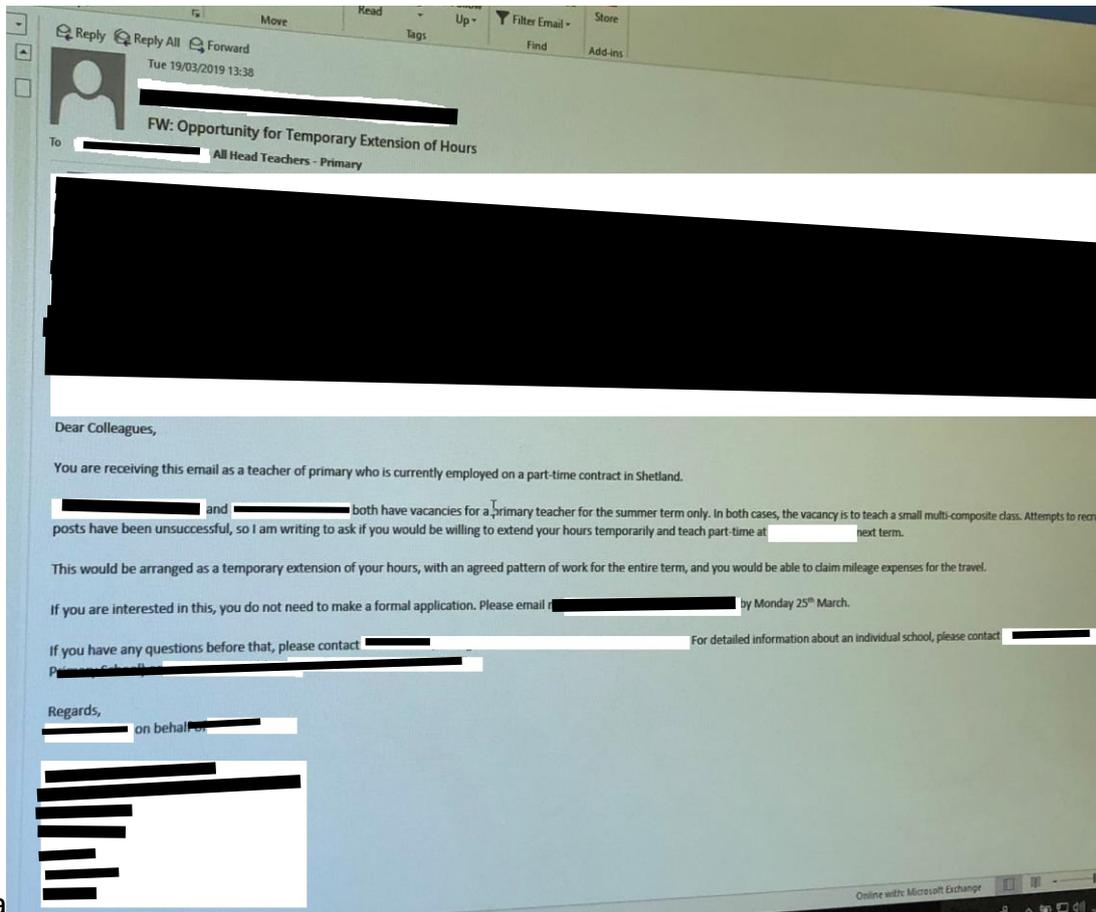
Shared Outlook diary.



Above is a photograph of some paperwork Catriona photocopied to meet requirements



Recipient's contact information which Catriona added to a group called Part Time Primary Teachers. She then sent out a group email to ask all part time primary school teachers if they would be interested in going on a supply list. (350 ST1.3) (see email on page 9)



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Email which Catriona created and sent to a group of people. (350 ST1.1, ST1.2, ST1.3, ST2.1)



Catriona filing paperwork as per organisational requirements.