

1997 Standards

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Unit B1 Support the efficient use of resources

Unit Summary

Overview

This unit is about the efficient management of resources for which you have authority and responsibility. It covers recommending the resources you and your team need to meet your objectives. It also covers monitoring and controlling the way in which resources are used.

This unit is for you if you are a manager or supervisor with

- a tightly defined area of responsibility
- some limited opportunity for taking decisions and managing budgets
- responsibility for achieving specific results by using resources effectively, *and*
- responsibility for allocating work to team members, colleagues or contractors.

This unit contains two elements

[B1.1 Make recommendations for the use of resources](#)

[B1.2 Contribute to the control of resources.](#)

In order to make recommendations for the use of resources, you need to involve people in identifying the resources your team needs. You need to look at how resources were used in the past, and at trends and developments in your organisation and industry which may affect your choice of resources. You need to identify the benefits which your recommendations may bring, and make your recommendations in an appropriate and timely manner.

You should continuously contribute to the control of resources. You need to encourage people to take responsibility for the way they use resources. You need to make sure resources are used efficiently and in ways which maintain the quality of services and products. You need to spot problems with the use of resources and make recommendations to correct these problems. You also need to keep accurate and complete records of the resources used.



Key words and concepts

These definitions are provided to explain how key words and concepts are used in this unit

benefits

positive results from the use of resources, for example: improved effectiveness and efficiency, better results for the customer

corrective action	action taken to match actual expenditure to budget, such as altering activities, modifying the use of resources, or re-negotiating the allocation of resources
ensuring consistency in product and service delivery	making sure that the products and services for which you are responsible continuously meet the standards agreed in your organisation and with your customers
impact on the environment	positive or negative effects on the environment which may result from the use of resources
monitoring	keeping a close eye on how resources are used and comparing this with plans or budgets
policies	rules which govern the use of resources, for example: planning policies, policies governing the supply of equipment and materials, health and safety policies, environmental policies
recommendations	requesting budget allocations or proposing the supply of resources your team needs to achieve its objectives; suggesting new methods of using available resources to improve your team's effectiveness and efficiency
relevant people	team members, colleagues working at the same level as yourself, higher-level managers or sponsors, specialists
resources	the equipment, materials, services, supplies, finance, energy and time your team needs to achieve its objectives
team members	people who work with you as part of a functional or project team; team members may report to you either as their line manager or as the manager in charge of a specific project or activity on which they are working
team objectives	clearly specified results which your team needs to achieve
trends and developments	changes in your team, organisation and market; for example, new skills and working methods, efficiency drives, new products and services, changes in customer requirements



Knowledge and Understanding

To perform effectively in this unit, you need to have knowledge and understanding in the areas of

- Analytical techniques
- Communication
- Involvement and motivation
- Organisational context
- Resource management.

You will find detailed knowledge requirements listed with each element.



Personal Competencies

In performing effectively in this unit, you will show that you

Communicating

- listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding
- identify the information needs of listeners
- adopt communication styles appropriate to listeners and situations, including selecting an appropriate time and place

Focusing on results

- maintain a focus on objectives
- tackle problems and take advantage of opportunities as they arise
- prioritise objectives and schedule work to make the best use of time and resources

Thinking and taking decisions

- produce a variety of solutions before taking a decision
- make use of, and reconcile, a variety of perspectives when making sense of a situation
- produce your own ideas from experience and practice
- take decisions which are realistic for the situation.



Element B1.1 Make recommendations for the use of resources

The National Standard

This section provides criteria to assess whether you make recommendations for the use of resources to the National Standard of competence. It also lists the [knowledge](#) and [understanding](#) which are essential for effective [performance](#).

Performance criteria

You must ensure that

*a) you give **relevant people** the opportunity to provide information on the resources your team needs*

*b) your **recommendations** for the use of resources take account of relevant past experience*

c) your **recommendations** take account of trends and developments which are likely to affect the use of resources

d) your **recommendations** are consistent with team objectives and organisational policies

e) your **recommendations** clearly indicate the potential benefits you expect from the planned use of resources

f) your **recommendations** are presented to **relevant people** in an appropriate and timely manner.

Knowledge requirements

You need to know and understand

Analytical techniques

- how to analyse the use of resources in the past, and utilise the results to make recommendations on more effective use of resources in the future.

Communication

- how to communicate effectively with team members, colleagues and line managers
- how to develop and argue an effective case for changes in the management of resources.

Involvement and motivation

- how to enable people to identify and communicate the resources they need.

Organisational context

- team objectives and organisational policies regarding the use of resources
- organisational procedures for making recommendations on the use of resources
- the trends and developments which may influence the future use of resources and how to plan for these.

Resource management

- the importance of effective management of resources to organisational performance
- the principles underpinning the effective and efficient management of resources
- the importance of keeping accurate records on the use of resources.

Element B1.1 Make recommendations for the use of resources

Assessment for best practice

If you wish to aspire to best practice, this section shows you how the Standards can be used for either organisational or self-assessment purposes and how to recognise success. It includes specific [evidence requirements](#) and general [examples of evidence](#).

Evidence requirements

You must prove that you consistently make recommendations for the use of resources to the National Standard of competence.

*To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.*

*Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.*

*You must show evidence that you seek information from, and make recommendations to, at least **two** of the following types of **relevant people***

- *team members*
- *colleagues working at the same level*
- *higher-level managers or sponsors.*

*You must also show evidence that you make **both** of the following types of **recommendations***

- *short term*
- *medium term.*

*You must, however, convince your assessor that you have the necessary knowledge, understanding and skills to be able to perform competently in respect of **all** types of **relevant people**, listed above.*

Examples of evidence

Here are a few examples to give you some ideas about the sort of evidence you might be able to find in your daily work.

Work activities

- *presentations of recommendations to relevant people.*

Products or outcomes

- *correspondence, memos and file notes*
- *project proposals, recommendations and contingency plans*
- *specifications and project plans.*

You may also provide short reports of your own, or statements from others who have observed your performance.

Written or spoken reports, describing

- *reasons for and benefits of recommendations you have made*
- *how your recommendations are consistent with organisational policies*
- *how you reached your conclusions and what use was made of existing data or past experiences.*

Witness testimony

- *statements from people who observed you making recommendations.*
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Element B1.2 Contribute to the control of resources

The National Standard

This section provides criteria to assess whether you contribute to the control of resources to the National Standard of competence. It also lists the [knowledge](#) and understanding which are essential for effective [performance](#).

Performance criteria

You must ensure that

- a) you give **relevant people** opportunities to take individual responsibility for the efficient use of resources*
- b) you monitor the use of resources under your control at appropriate intervals*
- c) the use of resources by your team is efficient and takes into account the potential impact on the environment*
- d) you monitor the quality of resources continuously and ensure consistency in product and service delivery*
- e) you identify problems with resources promptly, and make recommendations for **corrective action** to the **relevant people** as soon as possible*
- f) you make recommendations for improving the use of resources to **relevant people** in an appropriate and timely manner*
- g) your records relating to the use of resources are complete, accurate and available to authorised people only.*

Knowledge requirements

You need to know and understand

Communication

- *how to communicate effectively with team members, colleagues and line managers.*

Involvement and motivation

- *how to encourage others to take responsibility for the control of resources in their own area of work.*

Organisational context

- *team objectives and organisational policies regarding the use of resources*
- *the potential environmental impact of the resources being used*
- *the problems which may occur with resources and how you can deal with these*
- *organisational procedures for making recommendations on the use of resources.*

Resource management

- *the principles underpinning the effective and efficient management of resources*
- *how to monitor and control the use of resources to maximise efficiency, whilst maintaining the quality of products and services*
- *the importance of keeping accurate records on the use of resources.*

Element B1.2 *Contribute to the control of resources*

Assessment for best practice

If you wish to aspire to best practice, this section shows you how the Standards can be used for either organisational or self-assessment purposes and how to recognise success. It includes specific [evidence requirements](#) and general [examples of evidence](#).

Evidence requirements

You must prove that you contribute to the control of resources to the National Standard of competence.

*To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.*

*Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.*

*You must show evidence that you give opportunities to take responsibility for the efficient use of resources to at least **one** of the following types of **relevant people***

- *team members*
- *colleagues working at the same level as yourself.*

*You must show evidence that you take at least **two** of the following types of **corrective action***

- *altering activities*
- *modifying the use of resources*
- *re-negotiating allocation of resources.*

*You must, however, convince your assessor that you have the necessary knowledge, understanding and skills to be able to perform competently in respect of **all** types of **relevant people** and **corrective action**, listed above.*

Examples of evidence

Here are a few examples to give you some ideas about the sort of evidence you might be able to find in your daily work.

Work activities

- *contributions to team meetings.*

Products or outcomes

- *business plans, team development plans and continuous improvement plans*
- *periodic reports of expenditure against budget, identifying significant deviations and recommending corrective action*
- *minutes of meetings, file notes and correspondence explaining resource position and securing agreement to requests.*

You may also provide short reports of your own, or statements from others who have observed your performance.

Written or spoken reports, describing

- *your management information systems, reporting procedures and monitoring systems*
- *how you identified and dealt with problems*
- *your level of authority, and your ability to influence others outside your area of authority*
- *how you consulted others and got them involved.*

Witness testimony

- *statements from people who were given the opportunity to take responsibility.*

[Short cut to Unit B2](#)