

1997 Standards

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Unit B2 Manage the use of physical resources

Unit Summary

Overview

This unit is about efficiently managing the physical resources for which you are responsible. It covers planning to use the resources you and your team need, obtaining those resources, ensuring the availability of suitable supplies, and monitoring the use of resources.

This unit is for you if you are a manager with responsibility for

- allocating work to others
- achieving specific results by using resources effectively
- carrying out policy in your defined area of authority
- controlling limited financial budgets, *and*
- contributing to broader activities such as change programmes and recruitment.

This unit contains four elements

[B2.1 Plan the use of physical resources](#)

[B2.2 Obtain physical resources](#)

[B2.3 Ensure availability of supplies](#)

[B2.4 Monitor the use of physical resources.](#)

In order to plan the use of physical resources, you need to identify the resources your team needs. You need to look at past resource usage and at trends and developments which may affect your choice of resources. Finally, your plans should be in line with organisational objectives, policies and procedures and with legal requirements.

In order to obtain physical resources, you need to estimate costs and potential benefits and make requests to the relevant people. You need to ensure that the physical resources you request are sufficient to support all the activities you are responsible for, and make amendments to your plans should the necessary resources not be forthcoming.

In order to ensure the availability of supplies, you need to identify what is required and ensure that suppliers provide equipment and materials of the right quality. You have to negotiate with suppliers and reach agreements which provide good value and meet organisational and legal requirements. You also need to ensure that supplies meet agreed standards. You must keep accurate records of supplies and take appropriate action in the event of problems with supplies.

In order to monitor the use of physical resources, you need to encourage members of your team to take responsibility for how they use resources. You must make sure resources are used efficiently with minimum adverse impact on the environment. You need to monitor the

quality of resources continuously and make sure standards of service and product delivery are maintained. Where problems with the use of resources occur, you need to take prompt and effective corrective action. Finally, you must keep accurate and complete records.



Key words and concepts

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

corrective action	altering activities, modifying the use of resources or renegotiating the allocation of resources in response to deviations from plans
ensuring consistency in product and service delivery	making sure that the products and services you are responsible for continuously meet standards agreed in your organisation and with your customers
impact on the environment	improvements or damage to the local environment which may come about through use of equipment and materials
legal requirements	laws relevant to physical resources, for example health and safety and environmental legislation, industry specific legislation
monitoring	keeping a close eye on how resources are being used and comparing this with your plans; methods include directly observing activities yourself and considering oral and written information provided by others
organisational objectives and policies	objectives and policies relevant to the use of resources, for example departmental planning and financial targets and procedures, policies governing the supply of equipment and materials, health and safety requirements and environmental concerns
physical resources	equipment, materials, premises, services and energy
plans	documents or spoken agreements which describe the work your team will carry out, when, by whom, to what standard and with what resources, in order that your requirements and objectives can be met
potential benefits	the positive results you expect, for example improved effectiveness and efficiency of your team and the organisation as a whole, better results for the customer
recommendations	requesting budget allocations and proposing the purchase and supply of equipment and materials your team needs to achieve its objectives; suggesting new methods of using available resources to improve the team's effectiveness and efficiency
relevant people	team members, colleagues working at the same level as yourself, higher-level managers or

supplies	sponsors, and specialists the ongoing provision of goods and services required
trends, developments and factors likely to affect future resource usage	likely changes in the team, organisation and market which your work will have to keep up with, 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

- Agreements and contracts
- Analytical techniques
- Communication
- Information handling
- Involvement and motivation
- Monitoring and evaluation
- Organisational context
- Planning
- 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 | <ul style="list-style-type: none"> • listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding • identify the information needs of listeners • adopt communications styles appropriate to listeners and situations, including selecting an appropriate time and place |
| Focusing on results | <ul style="list-style-type: none"> • maintain a focus on objectives • tackle problems and take advantage of opportunities as they arise • prioritise objectives and schedule work to make best use of time and resources • monitor quality of work and progress against |

plans

Influencing others

- develop and use contacts to trade information, and obtain support and resources
- present yourself positively to others
- create and prepare strategies for influencing others
- use a variety of means to influence others
- understand the culture of your organisation and act to work within it or influence it

Thinking and taking decisions

- break processes down into tasks and activities
- identify a range of elements in and perspectives on a situation
- identify implications, consequences or causal relationships in a situation
- use your own experience and evidence from others to identify problems and understand situations
- produce a variety of solutions before taking a decision
- take decisions which are realistic for the situation.



Element B2.1 Plan the use of physical resources

The National Standard

This section provides criteria to assess whether you plan the use of physical 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 opportunities to **relevant people** to provide information about the physical resources required*

*b) your **plans** take account of relevant past experience, trends and developments and factors likely to affect future resource use*

*c) your **plans** are consistent with your organisation's objectives, policies and legal requirements*

*d) you present your **plans** to **relevant people** in an appropriate and timely manner.*

Knowledge requirements

You need to know and understand

Communication

- how to present and communicate plans on resource usage effectively.

Involvement and motivation

- how to encourage and enable staff to communicate their needs for resources.

Organisational context

- organisational objectives, policies and legal requirements relevant to resource usage, how to interpret these and identify the implications for resource planning.

Planning

- the principles underpinning effective resource planning and your role and responsibility in relation to this
- how to develop short-, medium- and long-term plans for the use of resources the types of trends and developments which might impact on your use of resources, how to analyse these and draw out the implications for planning.

Element B2.1 Plan the use of physical 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 plan the use of physical 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 present plans to, at least **two** types of the following **relevant people**

- team members
- colleagues working at the same level
- higher-level managers or sponsors
- people outside your organisation.

You must also show evidence of **two** of the following types of **plans**

- *short term*
- *medium term*
- *long 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** and **plans**, 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

- *presenting plans to your team and others.*

Products or outcomes

- *draft plans produced after team meetings*
- *reports of resource usage*
- *your reports demonstrating how issues such as trends and developments might affect predicted resource requirements*
- *correspondence and work records*
- *minutes of meetings*
- *your notes on the impact of legislation on specific aspects of organisational work.*

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

Written or spoken reports, describing

- *aims and objectives of your organisation and how your team fits within the overall structure*
- *how you identified required resources*
- *the extent and role of your team and how you motivate its members.*

Witness testimony

- *statements from those who have observed you presenting plans.*



Element B2.2 Obtain physical resources

The National Standard

This section provides criteria to assess whether you obtain physical 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) your **requests** for physical resources clearly show the costs involved and the anticipated benefits you expect from the use of the resources
- b) you present your **requests** for physical resources to **relevant people** in time for the necessary resources to be obtained
- c) you present **requests** for physical resources in ways which reflect the commitment of those who will be using the resources
- d) the physical resources you obtain are sufficient to support all activities within your control
- e) where you cannot obtain the physical resources you need in full, you agree appropriate amendments to your plans with **relevant people**.

Knowledge requirements

You need to know and understand

Analytical techniques

- how to carry out cost-benefit analyses for the use of resources.

Communication

- how to develop and present an effective case for resources to relevant people.

Involvement and motivation

- how to obtain and maximise commitment to resource planning.

Organisational context

- procedures to follow in order to request resources.

Planning

- how to adjust work plans in the event of required resources not being available.

Resource management

- the physical resources which you need to carry out your activities effectively.

Element B2.2 Obtain physical 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 obtain physical 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 make **both** of the following types of **requests**

- spoken
- written.

You must show evidence that you can make and agree amendments to your plans with **two** of the following types of **relevant people**

- team members
- colleagues working at the same level as yourself
- higher-level managers or sponsors
- people outside your organisation.

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

- presenting requests for resources.

Products or outcomes

- written requests you made for resources
- correspondence and work records
- minutes of meetings
- your analyses of benefits and costs
- your amended plans.

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

Written or spoken reports, describing

- how you requested and secured required resources

- *how you obtained the commitment of those using the resources*
- *how you amended plans as a result of insufficient resources being available.*

Witness testimony

- *statements from people who observed you requesting resources.*

Element B2.3 Ensure availability of supplies

The National Standard

This section provides criteria to assess whether you ensure availability of supplies 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 identify the **supplies** you need accurately*
- b) the range of **suppliers** from which you choose is sufficiently wide to ensure adequate competition and continuity of **supplies***
- c) you negotiate with **suppliers** in a manner which will maintain good relations with them*
- d) the agreements you reach with **suppliers** provide good value and comply with organisational and legal requirements*
- e) you **monitor** the quality and quantity of **supplies** at appropriate intervals*
- f) the **supplies** you obtain consistently meet your organisation's requirements for quality, quantity and delivery*
- g) you deal with any actual or potential problems with **supplies** promptly*
- h) your records of **supplies** are complete, accurate and available only to authorised people.*

Knowledge requirements

You need to know and understand

Agreements and contracts

- *how to establish effective agreements with suppliers and the legal, ethical and organisational requirements which govern these.*

Analytical techniques

- *how to analyse work activities to identify required supplies*

- *how to select from a range of suppliers to ensure value for money, consistency, quality and continuity of supply within organisational and legal requirements.*

Monitoring and evaluation

- *how to monitor the provision of supplies to ensure ongoing quality, quantity, delivery and time requirements are being met.*

Organisational context

- *the legal and organisational requirements which govern the selection of suppliers, how to interpret these and identify the implications for your work.*

Resource management

- *the importance of continuity of supplies to maintaining the quality of products and services and your role and responsibility in relation to this*
- *the range of suppliers available for the physical resources you require*
- *the range of problems which may occur with supplies and suppliers and effective corrective action to take in response to these*
- *the importance of accurate record keeping in managing supplies and suppliers, and systems to ensure that this happens properly.*

Element B2.3 *Ensure availability of supplies*

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 ensure availability of supplies 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 obtain **one** of the following types of **supplies***

- *goods*
- *services.*

*You must show evidence that you work with **one** of the following types of **suppliers***

- *those inside your organisation*
- *those outside your organisation.*

*You must show evidence that you use **two** of the following types of **monitoring***

- *direct observation*
- *considering oral information from others*
- *considering written information from others.*

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 **supplies**, **suppliers** and **monitoring**, 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

- *negotiating with suppliers*
- *quality sampling.*

Products or outcomes

- *contracts and variations to contracts you prepared*
- *agreements and your letters offering contracts in principle*
- *your cost benefit analyses*
- *your records of achievement against targets.*

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

Written or spoken reports, describing

- *your needs analyses and the assumptions on which they are based*
- *market research reports you have completed*
- *the extent to which your organisation meets legal requirements*
- *the basis for negotiations in which you have been involved*
- *the rationale for your monitoring plan and how it matches your organisation's quality assurance strategy*
- *how you dealt with the problems you encountered used the results for continuous improvement.*

Witness testimony

- *statements from people who observed you negotiating and concluding agreements with suppliers.*



Element B2.4 Monitor the use of physical resources

The National Standard

This section provides criteria to assess whether you monitor the use of physical 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 opportunities to team members to take individual responsibility for the efficient use of physical resources*
- b) your team's use of physical resources is efficient and takes into account the possible impact on the environment;*
- c) you **monitor** the quality of physical resources continuously*
- d) your methods of **monitoring** the use of physical resources are reliable and comply with organisational requirements*
- e) you **monitor** the actual use of physical resources against an agreed plan at appropriate intervals*
- f) you take prompt **corrective action** to deal with actual or potential significant deviations from your plan*
- g) your records relating to the use of physical resources are complete, accurate and available to authorised people only.*

Knowledge requirements

You need to know and understand

Information handling

- *principles of confidentiality regarding the use of resources: which types of information may be made available to whom.*

Involvement and motivation

- *how to encourage and empower team members to take responsibility for the efficient use of resources.*

Monitoring and evaluation

- *the importance of effective monitoring of resource use to organisational efficiency and your role and responsibility in relation to this*
- *how to monitor and control resource usage to maintain consistency and quality in the provision of products and services.*

Organisational context

- *the organisational and legal requirements regarding the impact of resource usage on the environment and how to minimise adverse effects*

- your organisation's requirements for controlling resource usage
- your planned objectives and measures for resource usage.

Resource management

- the range of obstacles to efficient use of resources and effective corrective action to take in response to these
- the importance of effective record keeping in the use of resources and how to ensure that this happens.

Element B2.4 Monitor the use of physical 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 monitor the use of physical 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 use **two** of the following types of **monitoring**

- your own observation
- considering oral information from others
- considering written information from others.

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

- altering activities
- modifying the use of physical resources for activities
- renegotiating the allocation of physical 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 **monitoring** 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

- *presenting at team meetings.*

Products or outcomes

- *business development plans and periodic reports of progress towards objectives*
- *your monitoring reports of expenditure against budget profile, identifying deviations and corrective action to be taken*
- *your cost benefit analyses*
- *your reports assessing impact of activities in wider contexts (organisational and on external environment)*
- *minutes of meetings and correspondence explaining how the use of resources meets strategic objectives and the benefits to the organisation.*

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

Written or spoken reports, describing

- *how you encouraged team members to take responsibility*
- *how you devised and used monitoring methods*
- *how you identified and overcame problems, and what alternative courses of action you considered.*

Witness testimony

- *statements from those to whom you gave opportunities to take individual responsibility for the efficient use of resources.*

[Short cut to Unit B3](#)

