

## **Unit: CPC 303 Research and manage information (Commissioning, Procurement and Contracting)**

### **Key Purpose**

The key purpose identified for those working in commissioning, procurement and contracting is to: "Specify, shape and secure quality services, responses and projects that deliver improving outcomes for individuals, families and communities within the strategic objectives of the organisation"

### **Elements of competence**

<b>CPC 303 A Plan to research, collate and use information</b>
<b>CPC 303 B Analyse information and provide advice</b>
<b>CPC 303 C Organise, record and store information</b>

### **About this unit**

This unit is about managing all the data and information that is an essential part of effective commissioning, procurement and contracting. The information could be managed using information technology or using manual systems, or a combination of both. The information could include: individual or wider local outcomes, assessment of needs, demand levels, demographics or user satisfaction. The information and your advice may be used for a range of purposes including: plans for market development, service development or design, policy development or planning. The information could be from individuals, families and communities, service providers or partners. It needs to be stored so that it is accessible and can be used in appropriate ways to support decisions about commissioning.

### **Scope**

The scope helps to make sure that you provide evidence related to the work you do. Terms in this section give you options related to the words highlighted in bold in the performance criteria. Your evidence for this unit should cover any option that is part of your work.

**Information:** raw data; processed data; from primary sources; from secondary sources; written; verbal; electronic; quantitative information; qualitative information

**Methods of research:** desk based; searching existing data; literature search; questionnaire; structured interview; action research

**Relevant information sources:** primary sources; secondary sources

**Rights:** legal rights; rights included in policies; rights because of the ethics of your organisation; rights as an employee; rights as a result of a contract with your organisation

**Risks:** risks to people; risks to property; health and safety risks; actions that may make adults or children vulnerable to harm from others; risks of legal action; risks to reputation; risks of poor performance; risk of financial loss

**Analyse information using appropriate methods:** statistical analysis; illustrative analysis; qualitative analysis; mapping, profiling; forecasting; modelling

**Colleagues:** members of own team; members of other teams with whom you are in contact; managers; peers.

**People outside your organisation:** individuals, families and communities; providers; partners; inspectors; advisors; consultants

**Questions, queries:** questions from colleagues; questions from managers; questions from decision makers; questions from people outside your organisation; written questions by e-mail or letter; verbal questions either directly or by telephone

**Advice:** to colleagues; to others outside the organisation, to providers; to contractors; to partner agencies; to individuals, families and communities

**Organise and record:** manual system; electronic system; for sharing with others; confidential

**Commitments:** verbal; written; formal; informal

## Values

The values underpinning this unit have been derived from the key purpose statement, the values and principles statement, relevant service standards and codes of practice for health and social care in the four UK countries. The values and principles statement is at the start of these units:

## Key words and concepts

This section provides explanations of the key words and concepts used in this unit. In occupational standards it is quite common to find familiar words or phrases used, which, in the detail of the standards, may be used in a very particular way. **Therefore we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required.**

**Primary sources:** asking questions directly of people with information; this can be obtained through questionnaires or verbal questions

**Secondary sources:** using information that has already been gathered by someone else for a similar or different purpose. This can involve using books or articles, the internet or existing databases

**Analyse:** to explore and examine the data you have collected and to find out and interpret what it tells you. Once you have interpreted the data it becomes information

**Accessible:** something that people can understand, regardless of the level or way in which they communicate; this may mean translating information, or providing it in large print or on audio tape, or just in plain English

**Information:** raw, recorded and interpreted data

**Sustainable:** an activity/intervention and/or service able to meet current needs without damaging the ability of future generations to meet their needs. This means thinking about what you do and making sure that you are not damaging the environment

**Ethical:** actions that meet an accepted code of principles or policies, ensuring that the activities of organisations or individuals do not exploit or harm others

### **CPC 303 A Plan to research, collate and use information**

#### **Performance Criteria**

You must show that you:

1. Accurately establish the aims, objectives and deadlines for the **information** you need to research
2. Plan **methods of research** to obtain the information you need in the most effective way
3. Ensure that you plan your research in a way that meets ethical guidelines and fully reflects diversity
4. Access **relevant information sources** and interrogate databases accurately, where necessary, for information from **secondary sources**
5. Obtain information directly from **primary sources**, where necessary and appropriate
6. Clearly explain to those providing information how it will be recorded and stored and the **rights** they have in respect of it
7. Fully consider the **risks** involved in obtaining the information and record the steps necessary to reduce them

### **CPC 303 B Analyse information and provide advice**

#### **Performance Criteria**

You must show that you:

1. Prepare to analyse information in order to meet the aims and objectives of the research
2. **Analyse information using appropriate methods** that are cost effective and in line with available resources
3. Identify where the resulting analysis or information is relevant to **colleagues** and pass it on promptly
4. Identify where the analysis or information may be relevant to **people outside your organisation** and pass it on, in line with your organisation's policies on sharing information and in an accessible format
5. Accurately identify the appropriate information to meet information requests from others
6. Provide information to others in a useful and **accessible format** and in line with legal requirements and organisational guidelines
7. Deal with **questions, queries** and requests for additional information clearly and promptly
8. Deal with requests for **advice** based on the information you have given clearly and promptly
10. Assess and manage the **risks** associated with analysis and providing advice, in line with your organisation's policies for risk management
11. Reflect objectively on the strengths and weaknesses of your performance in planning and undertaking research and take up relevant opportunities for further development

### **CPC 303 C Organise, record and store information**

#### **Performance Criteria**

You must show that you:

1. **Organise and record** the data and information in a **sustainable** way that will be useful to you and others
2. **Record** the detail of the data and information you have researched accurately and clearly
3. Record your sources of information, in line with any **commitments** you made to those providing information
4. Store the information securely, according to organisational procedures and in a sustainable way that will help you and others to retrieve it in the future
5. Safeguard confidential information in accordance with relevant legislation and organisational guidelines

## **Knowledge specification for the whole of this unit**

Competent practice is a combination of the application of skills and knowledge informed by values and ethics. This specification details the knowledge and understanding required to carry out competent practice in the performance described in this unit.

When using this specification **it is important to read the knowledge requirements in relation to the expectations and requirements of your job role.**

You need to show that you know, understand and can apply in practice:

### **Values**

1. Legal and organisational requirements on equality, diversity, discrimination, rights, confidentiality and sharing of information
2. How to ensure that you and others for whom you are responsible protect the rights and the interests of other when collecting, analysing and storing information
3. How to ensure that all research and collection of data and information is conducted ethically and in a sustainable way
4. How to manage ethical dilemmas and conflicts that arise from collecting and storing information.
5. Ways to engage individuals, families and communities in researching, analysing and storing information
6. Methods of making data, information and analysis accessible for individuals, families, communities and organisations
7. Different approaches and methods of collecting and analysing data and information and how to work out which is the most cost effective
8. How different philosophies, principles, priorities and codes of practice can impact on collecting, storing and sharing information with and from other organisations

### **Legislation and organisational policy and procedures**

9. Codes of practice and conduct, and standards and guidance relevant for your workplace and the roles, responsibilities, accountability and duties of yourself and others when collecting and storing information
10. Current local, UK and European legislation and organisational requirements, procedures and practices for collecting recording and storing data

11. Key government initiatives that affect organisational practices about collecting and storing information
12. Policies, procedures, guidance and protocols with the other organisations and professions with which you work that are relevant to collecting and storing information

### **Theory and practice**

13. Why it is important to be clear about what information you need to find before you begin any research
14. The main sources of information you can use when carrying out research
15. Why it is important to keep a record of your sources
16. The relevant manual and electronic systems used in your organisation for storing, organising and finding information and how to use these
17. The manual and electronic systems that others may use and how to make sure that they can use the information and data that you collect and store
18. The risks associated with collecting and storing data and information and how to manage them
19. How to analyse information to find precisely the information that you need.
20. How to identify information that will be helpful to others and why information sharing is important
21. How to organise and record information in a way that will be helpful to yourself and others
22. Why it is important to store information securely
23. What is confidential information and how you should handle it?
24. Why and how you should store information in a way that will help you and others find it in the future
25. The types of development opportunities that may be available and how to access them