

Unit: CPC 308 Contribute to the planning, monitoring and management of resources (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

CPC 308 A Contribute to planning the use of resources
CPC 308 B Contribute to monitoring and managing the use of resources
CPC 308 C Contribute to review and evaluation of resource management

About this unit

An important function of staff working in commissioning, procurement and contracting is to make sure that they are aware of how resources are being used. Resources include: people, information, materials, time and equipment. Ensuring that resources are being used in the best way includes: making contributions to planning; monitoring and managing the use of resources; making suggestions for improvement, communicating clearly with others; keeping accurate records; solving problems and taking action when plans are slipping; understanding information about costs, and about the outcomes to be achieved.

Scope

The scope is here to give you guidance on possible areas to be covered in this unit. The terms in this section give you a list of options linked with the words highlighted in bold in the performance criteria. You need to provide evidence for any option related to your work area.

Provide information: written (electronic or paper); verbal (face to face or telephone); directly; or indirectly via a line manager or other person. Directly to those concerned; or indirectly through website, forum, newsletter, etc.

Resources: financial; human; physical; time; energy

People: individuals, families and communities; colleagues; line manager; service providers; partners

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

Seek feedback: from individuals, families and communities who use services; from service providers; from partners; from agencies and organisations that have an interest in what you do. In written form; electronically; by telephone; through forums; through public meetings and consultations; through individual contact

Provide information: written (electronic or paper); verbal (face to face or telephone); directly; or indirectly.

Plans: written; oral; long-term; short-term

Records: manual system; electronic system; for sharing with others; confidential

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.**

Eligibility criteria: factors that are used to decide whether or not a particular individual can have resources or services

Outcome: desired result of activities, interventions and / or services

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

Inclusive: enables everyone to understand/participate/gain access. Does not exclude people because of language (either

level or format), physical access barriers, emotional/social barriers or affordability

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

Organisation: The organisation/company/local authority for whom you work or volunteer; the organisation/company you own or run; if you receive direct payments or fund your own services, it means you and the people who work for you

Criteria: factors that can be used to measure and make a judgement about: whether or not an outcome has been achieved; how much progress has been made; or how well something has been done

CPC 308 A Contribute to planning the use of resources

Performance Criteria

You must show that you:

- 1 Provide accurate and relevant **information** to appropriate **people** about the availability and use of **resources**
- 2 Identify significant trends and changes and make suggestions for action to appropriate people
- 3 Ensure that recommendations and plans take account of policies, financial constraints and any **eligibility criteria**
- 4 Ensure that recommendations and plans clearly indicate the positive **outcomes** that should be achieved from the use of resources
- 5 Ensure that recommendations and plans are clearly **sustainable** and **inclusive**
- 6 Assess and make recommendations to manage any **risks** arising from the way in which resources are used
- 7 Present recommendations and plans clearly and in an **accessible** way
- 8 **Seek feedback** on plans from the appropriate people

CPC 308 B Contribute to monitoring and managing the use of resources

Performance Criteria

You must show that you:

- 1 Ensure that resources are used accordance with agreed plans
- 2 Interpret and **provide information** on the use of resources to the appropriate people
- 3 Make recommendations for more efficient use of resources to the appropriate people
- 4 Ensure that **records** of how resources are used are complete, accurate and legible, and meet any **organisational** requirements
- 5 Take prompt action in response to significant variations in planned and actual usage of resources
- 6 Make sure that people are aware of any individual responsibility they may have for the use of resources
- 7 Ensure that systems and procedures for monitoring and maintaining resources are in accordance with requirements

CPC 308 C Contribute to review and evaluation of resource management

Performance criteria

You must show that you:

1. Identify suitable **criteria** for measuring how well resources are managed
2. Gather accurate and clear information about the ways in which resources are used, how resources are accessed and by whom
3. Seek feedback from individuals, families and communities about whether resources are meeting required outcomes
4. Gather information from contract monitoring teams about the extent to which required outcomes are being met
5. Use this information and the identified criteria and measures to evaluate the effectiveness of resource management
6. Report the outcomes of the evaluation to the appropriate people promptly

7. Reflect objectively on your own performance in monitoring and managing resources and identify areas for further development

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 about resources
2. How to ensure that you and others for whom you are responsible protect the rights and the interests of individuals, families and communities
3. How to manage ethical dilemmas and conflicts for individuals, families and communities that use services, partners, providers and staff
4. The importance of using resources effectively to achieve best possible value
5. Why plans for using resources must be sustainable

Legislation and organisational policy and procedures

6. Codes of practice and conduct, standards and guidance and the roles, responsibilities, accountability and duties of others in the use of resources
7. Current local, UK and European legislation and organisational requirements, procedures and practices for monitoring and managing resources
8. Key government initiatives which affect the organisational practices about using resources
9. How different philosophies, principles, priorities and codes of practice can impact on the way resources are used

10. Policies, procedures, guidance and protocols with the other organisations and professions with which you work that are relevant to the use of resources

Theory and practice

11. Approaches and theories of resource management
12. Methods of assessing the availability of resources
13. Methods of assessing the sustainability of plans to use resources
14. Ways of supporting people to monitor and manage the use of resources when they are directing their own services
15. Methods of assessing and managing the risks associated with resource management
16. Ways of presenting a logical, clear argument which addresses the needs and priorities of its recipient
17. Ways of establishing, defining and reviewing objectives and performance measures
18. Ways of evaluating implications of the availability and use of resources
19. The factors likely to affect resource use
20. How to record the use of resources, both actual and targeted
21. How to access opportunities for professional development