

Unit: CPC 409 Manage resources to meet priorities and demand (Commissioning, Procurement and Contracting)

Key Purpose

For those who work in commissioning, procurement and contracting, the key purpose has been identified as:
 "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 409 A Identify and review resources available to meet demand
CPC 409 B Establish commissioning priorities and balance demands on resources
CPC 409 C Secure effective resource allocation for activities and projects

About this unit

This unit is about knowing the resources that will be available to meet the needs and outcomes you have identified, and about identifying the limits to achieving outcomes within the resources you have available. In this unit you will show that you are able to work alongside people to work out which areas have to take priority when resources are scarce. It is also about looking at other ways that resources could be made available, negotiating budgets and justifying expenditure. This unit covers preparing and justifying proposals for expenditure and negotiating and agreeing budgets.

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.

Resources: financial; human; physical; time

Potential benefits: profitability; productivity; quality of service/product; environmental impact; working conditions; working relationships; motivation of individual employees

Provide information: written (electronic or paper); verbal (face to face or telephone); directly to decision makers, or indirectly via a line manager or other person. Directly to

those concerned or indirectly through website, forum, newsletter, etc.

Consultation: written questionnaires; electronic feedback; by telephone; through forums; through public meetings; through consultation events; through individual contact.

Values

The values underpinning this unit have been derived from 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.**

Local population: this can mean either the general population served by your organisation, or a specific population with particular needs

Resources: this can mean financial resources, or it can be about staff, time, buildings, equipment, skills or experience

Constraints: finance; personnel availability; workload commitment; organisational requirements and plans;

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 language

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

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

CPC 409 A Identify and review resources available to meet demand

Performance Criteria

You must show that you:

1. Use accurate forecasts and projections to determine the level of demand on services
2. Calculate the financial commitment necessary to meet the anticipated demand
3. Find accurate information on the financial and other **resources** known to be available
4. Consider ways in which resources, both financial and non-financial can be used most effectively in order to improve outcomes
5. Identify the amount of shortfall between demand and the resources available to meet it
6. Assess the impact of any shortfall on the ability of your organisation to meet identified outcomes
7. Identify and thoroughly assess the viability of opportunities for additional financial resources
8. Develop and present a competent business case for additional resources if necessary
9. Make **information** on any potential shortfall of resources available to the relevant people including decision makers, service providers, individuals, families and communities in an **accessible** way
10. Store accurate, legible and complete **records** of the process for future use

CPC 409 B Establish commissioning priorities and balance demands on resources

Performance Criteria

You must show that you:

1. Manage effective **consultation** processes in order to share information and engage individuals, families and communities in agreeing commissioning priorities
2. Agree, with consultation participants, the **criteria** which will determine how priorities are set and resources allocated
3. Provide clear information about setting **sustainable** priorities within the overall policies and strategies of your organisation

4. Encourage the development of draft priorities which can be shared for wider involvement
5. Agree the criteria which will apply to the allocation of resources
6. Provide accurate information about the availability of resources
7. Respond positively to innovative suggestions about ways to use available resources effectively
8. Share information on the options of service redesign in order to make best use of resources
9. Provide accurate information about the impact of any commissioning decisions on other resource demands
10. Ensure that demands for resources are balanced in ways, which are seen to be transparent, understandable, justified and reasonable

CPC 409 C Secure effective resource allocation for activities and projects

Performance Criteria

You must show that you:

1. Support estimates of costs and benefits by valid, relevant information
2. Make recommendations that clearly indicate the **net benefits** over time that are likely to be achieved from the expenditure
3. Make recommendations that take account of possible future variation in levels of activity
4. Make clear, concise presentations in an appropriate form
5. Provide further explanation to promote acceptance where challenges are made to the proposal
6. Conduct budget negotiations in a manner likely to maintain good relationships and within agreed time scales
7. Reach agreements that balance the overall needs of the organisation with the demands of your area of responsibility
8. Seek clarification where there is uncertainty or disagreement over the proposed budget
9. Inform all relevant people of budget decisions in a manner and at a time, which is likely to ensure their co-operation and confidence

Knowledge specification for the whole of this unit

Competent practice is a combination of the application of skills and knowledge informed by principles and values. 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 when considering resource management
2. Knowledge and practice that underpin the financial management of your organisation and enable you to:
 - a. place the individuals', families' and communities' preferences and best interests at the centre of everything you do
 - b. recognise the importance of adequate resources to achieving improved outcomes
3. How to manage ethical dilemmas and conflicts which arise when decisions around allocation of scarce resources are being made
4. How differing values and perspectives of funding agencies departments and workers affect the possibilities of obtaining additional resources
6. The impact of organisational structure and culture upon how flexibly and innovatively resources can be used
7. Methods of working in a sustainable way that has minimal impact on the environment

Legislation and organisational policy and procedures

8. Regulation, codes of practice and conduct relevant to yourself and others' codes of practice and conduct, and standards and guidance and the roles, responsibilities, accountability and duties of others when managing the spending of public finance
9. Current local, UK and European legislation and

organisational requirements, procedures and practices for:

- a. data protection
- b. health and safety
- c. risk assessment and management
- d. public spending

10. Key government initiatives which affect the organisational practices when managing and planning the use of resources

Theory and practice

11. An up-to-date knowledge of the literature related to best practice in finance and resource planning
12. Government reports, inquiries and research relevant to finance and resource planning
13. Theories of public sector financial management and effective resource generation and deployment
14. The differences between interdisciplinary, inter-agency and multidisciplinary and multi-organisational working and how these can be used to maximise resources
15. The use of evidence-based practice to:
 - a. justify your actions and decisions
 - b. record and report processes and outcomes of your work
16. Ways of negotiating and gaining agreement for additional resources
17. Organising and presenting financial information to support a proposal for expenditure
18. Defining budget heads and using virement
19. Presenting a logical, clear argument which addresses the needs and priorities of its recipient
20. Using tools of financial analysis such as cost-benefit analysis, differential cost analysis and risk analysis
21. Planning and scheduling financial flows over budgetary periods