

## M&LE8 Manage physical resources

### Overview

#### **What this Unit is about**

This Unit is about ensuring the availability of the physical resources (equipment, materials, premises, services and energy supplies) required to carry out planned activities in your area of responsibility. It involves identifying the resources required, making the business case to obtain these resources, planning how they will be used effectively, efficiently, sustainably, safely and securely, monitoring resource use and taking corrective action, if required.

#### **Who is the Unit for?**

The Unit is recommended particularly for first line managers and middle managers.

#### **Links to other Units**

This Unit is linked to Units **E1. Manage a budget, E2. Manage Finance For Your Area of Responsibility, E6. Ensure Health and Safety Requirements are Met In Your Area of Responsibility** and **E9. Manage the Environmental Impact of Your Work** in the overall suite of National Occupational Standards for Management and Leadership.

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### **Skills**

Listed below are the main generic 'skills' that need to be applied in managing physical resources. These skills are explicit/implicit in the detailed content of the Unit and are listed here as additional information.

- ◆ Analysing
- ◆ Communicating
- ◆ Contingency-planning
- ◆ Decision-making
- ◆ Evaluating
- ◆ Forecasting
- ◆ Influencing
- ◆ Involving others
- ◆ Monitoring
- ◆ Negotiating
- ◆ Persuading
- ◆ Planning
- ◆ Presenting information

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### Performance Criteria

*You must be able  
to:*

- 1 Invite those who use resources to contribute to identifying the resources required and planning and monitoring their use.
- 2 Evaluate past patterns of resource use and trends and developments likely to affect future demand for resources.
- 3 Identify the range and quantity of resources required for the planned activities in your area of responsibility, including likely contingencies.
- 4 Identify sustainable resources and ensure their effectiveness and efficiency.
- 5 Make the business case for the resources required, clearly showing the costs involved and the expected benefits.
- 6 Agree appropriate adjustments to your planned activities, where the required resources cannot be obtained in full.
- 7 Make arrangements with suppliers for resources to be available when required.
- 8 Plan to use resources in ways that are efficient and minimise any adverse impact on the environment.
- 9 Take appropriate action to ensure the security of resources and that they are used safely.
- 10 Monitor the quality of resources and patterns of resource use continuously.
- 11 Take timely corrective action to deal with any significant discrepancies between actual and planned resource use.

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### **Behaviours**

*You will exhibit the following behaviours:*

- 1 You recognise changes in circumstances promptly and adjust plans and activities accordingly.
- 2 You prioritise objectives and plan work to make the best use of time and resources.
- 3 You accurately calculate risks, and make provision so that unexpected events do not impede the achievement of objectives.
- 4 You monitor the quality of work and progress against plans and take appropriate corrective action, where necessary.
- 5 You make best use of existing sources of information.
- 6 You identify clearly the value and benefits to people of a proposed course of action.
- 7 You present ideas and arguments convincingly and in ways that strike a chord with people.
- 8 You identify the range of elements in a situation and how they relate to each other.
- 9 You identify the implications or consequences of a situation.
- 10 You take timely decisions that are realistic for the situation.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **General knowledge and understanding**

- 1 Why it is important to involve those who use resources in identifying, planning and monitoring resources, and how to do so.
- 2 How to identify the range and calculate the quantity of resources required to carry out planned activities.
- 3 The importance of using sustainable resources and how to identify such resources and ensure their effectiveness and efficiency.
- 4 How to carry out a cost-benefit analysis.
- 5 How to make a business case.
- 6 How to develop an operational plan and make adjustments to the plan if required resources cannot be obtained in full.
- 7 How to make arrangements with suppliers to ensure resources are available when required.
- 8 The potential impact of resource use on the environment and actions you can take to minimise any adverse impact.
- 9 Risks associated with the types of resources used and actions you can take to ensure resources are secure and used safely.
- 10 The importance of monitoring the quality and use of resources continuously, and how to do so.
- 11 The types of corrective actions (eg changing planned activities, changing the ways in which resources are used for activities, renegotiating the availability of resources) you can take in case of significant discrepancies between actual and planned resource use.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Industry/sector specific knowledge and understanding**

- 1 Industry/sector requirements for managing physical resources.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Context specific knowledge and understanding**

- 1 Past patterns of resource use in your area of responsibility and how to access this information.
- 2 Trends and developments that affect future demand for resources in your area of responsibility and how to evaluate the likely impact of these.
- 3 The planned activities in your area of activity and possible contingencies.
- 4 Actual and potential suppliers of the resources you need.

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### Evidence Requirements

| PC                              | Evidence of Performance Criteria:<br>◆ possible examples of evidence  | Behaviours                 | Knowledge and Understanding |                   |                  |
|---------------------------------|---|----------------------------|-----------------------------|-------------------|------------------|
|                                 |   |                            | General                     | Industry specific | Context specific |
|                                 | <b>Records of your actions to identify utilisation, future requirements and options for changes in the resources employed</b>   |                            |                             |                   |                  |
| PC1<br>PC2<br>PC3<br>PC4<br>PC9 | ◆ notes of meetings, e-mails, memos letters and reports relating to discussions with colleagues, suppliers and consultants on resource utilisation, resource options and future requirements                    | 1, 2, 5, 6, 7, 8, 9, 10    | 1, 2                        | 1                 | 1, 2, 3, 4       |
|                                 | ◆ monitoring data, records, audit reports and other data on resource costs, availability and utilisation, and spreadsheets and other analyses and computations based on this data                               | 4, 5, 8, 9                 | 9,10                        | 1                 | 1, 2, 3          |
|                                 | ◆ copies of reports, reviews and analyses of potential new resources, and your summaries, analyses and commentaries on these  | 3, 5, 7                    | 1, 2                        | 1                 | 3, 4             |
|                                 | ◆ reports, presentations, costs schedules, draft budgets and financial forecasts, cost-benefit analyses, e-mails, memos and letters that you have prepared, to make a business case for acquiring new resources | 1, 3, 5, 6, 7, 8, 9, 10    | 2, 3, 4                     | 1                 | 1, 2, 3, 4       |
|                                 | ◆ personal statement (reflections on your own actions to review resource utilisation, future requirements and options for changes in the resources employed)  | 1, 2, 3, 5, 6, 7, 8, 9, 10 | 1, 2, 3, 4, 10              | 1                 | 1, 2, 3, 4       |
|                                 | ◆ witness statements (comments on your actions resource utilisation, future requirements and options for changes in the resources employed)   | 1, 2, 3, 5, 6, 7, 8, 9, 10 | -                           | -                 | -                |

| <b>Records of resource acquisition and utilisation planning</b> |  |                            |                            |   |            |
|---|--|----------------------------|----------------------------|---|------------|
| PC5<br>PC6<br>PC7<br>PC8<br>PC10<br>PC11                        | ◆ notes of negotiations with suppliers, letters, e-mails, orders and supply schedules to acquire new resources   | 1, 5, 6, 7, 8, 9, 10       | 1, 2, 7, 11                | 1 | 4          |
|   | ◆ spreadsheets, tables, database reports, Gantt charts, network diagrams, flow charts, plans and other records of the acquisition and planned organisation and utilisation of resources  | 4, 5                       | 5, 6, 9,10                 | 1 | 2, 3       |
|   | ◆ notes of meetings, e-mails, memos, letters, reports, procedure manuals, operational guidance and role profiles relating to the safe and secure use, handling and storage of resources  | 5, 6, 7, 8, 9, 10          | 7, 8,9                     | 1 | 1, 3       |
|   | ◆ variance reports, budget reconciliations, spreadsheets, database reports comparing actual and planned resource utilisation, and plans, reports, e-mails, memos and notes of meetings about actions to address variances and other discrepancies between planned and actual use of resources) | 1, 2, 3, 4, 5, 7, 8, 9, 10 | 9, 10, 11                  | 1 | 1, 2, 3    |
|   | ◆ personal statement (reflections on your own actions to plan and acquire resources and take corrective action)  | 1, 2, 3, 4, 5, 7, 8, 9, 10 | 1, 2, 5, 6, 7, 8, 9, 10,11 | 1 | 1, 2, 3, 4 |
|   | ◆ witness statements (comments on your actions)  | 1, 2, 3, 4, 5, 7, 8, 9, 10 | -                          | - | -          |