

## FM52 04 (CFAMLD5) Allocate and Check Work in Your Team

### Overview

#### What this Unit is about

This Unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members. It also involves checking on the progress and quality of the work of team members to ensure that the required level or standard or performance is being met.

#### Who is the Unit for?

The Unit is recommended for team leaders.

#### Links to other Units

This Unit is linked to Units **B5. Provide leadership for your team**, **D1. Develop productive working relationships with colleagues**, **D6 Allocate and monitor the progress and quality of work in your area of responsibility**, **D7. Provide learning opportunities for colleagues** and **D8. Help team members address problems affecting their performance** 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 allocating and checking work in your team. These skills are explicit/implicit in the detailed content of the Unit and are listed here as additional information.

- ◆ Communicating
- ◆ Providing feedback
- ◆ Planning
- ◆ Reviewing
- ◆ Motivating
- ◆ Valuing and supporting others
- ◆ Problem-solving
- ◆ Monitoring
- ◆ Decision-making
- ◆ Prioritising
- ◆ Team-building
- ◆ Managing conflict
- ◆ Information management
- ◆ Leadership
- ◆ Coaching
- ◆ Delegating
- ◆ Setting objectives
- ◆ Stress management

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### Performance Criteria

*You must be able  
to:*

- 1 Confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues.
- 2 Plan how the team will undertake its work, identifying any priorities or critical activities and making best use of the available resources.
- 3 Allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development.
- 4 Brief team members on the work they have been allocated and the standard or level of expected performance.
- 5 Recognise and seek to find out about differences in expectations and working methods of any team members from a different country or culture and promote ways of working that take account of their expectations and maximise productivity.
- 6 Encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated.
- 7 Check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback.
- 8 Support team members in identifying and dealing with problems and unforeseen events.
- 9 Motivate team members to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion.
- 10 Monitor the team for conflict, identifying the cause(s) when it occurs and dealing with it promptly and effectively.
- 11 Identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with team members.
- 12 Recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager.
- 13 Use information collected on the performance of team members in any formal appraisal of performance.

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### Behaviours

*You will exhibit the following behaviours:*

- 1 You make time available to support others.
- 2 You clearly agree what is expected of others and hold them to account.
- 3 You prioritise objectives and plan work to make best use of time and resources.
- 4 You state your own position and views clearly and confidently in conflict situations.
- 5 You show integrity, fairness and consistency in decision-making.
- 6 You seek to understand people's needs and motivations.
- 7 You take pride in delivering high quality work.
- 8 You take personal responsibility for making things happen.
- 9 You encourage and support others to make the best use of their abilities.
- 10 You are vigilant for possible risks and hazards.

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### Knowledge and Understanding

*You need to know and understand:*

### General Knowledge and Understanding

- 1 Different ways of communicating effectively with members of a team.
- 2 The importance of confirming/clarifying the work required of the team with your manager and how to do this effectively.
- 3 How to plan the work of a team, including how to identify any priorities or critical activities and the available resources.
- 4 How to identify sustainable resources and ensure their effective use when planning the work of a team.
- 5 How to identify and take due account of health and safety issues in the planning, allocation and checking of work.
- 6 Why it is important to allocate work across the team on a fair basis and how to do so.
- 7 Why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so.
- 8 The values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any team members from a different country or culture and how your own values, ethics, beliefs, faith, cultural conventions, perceptions, expectations, use of language, tone of voice and body language may appear to them.
- 9 Ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated.
- 10 Effective ways of regularly and fairly checking the progress and quality of the work of team members.
- 11 How to provide prompt and constructive feedback to team members.
- 12 How to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and improve their performance, and for recognising their achievements.
- 13 The additional support and/or resources which team members might require to help them complete their work and how to assist in providing this.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Industry/sector specific Knowledge and Understanding**

- 1 Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.
- 2 Industry/sector requirements for the development or maintenance of knowledge, understanding and skills.

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### Knowledge and Understanding

*You need to know and understand:*

### Context specific Knowledge and Understanding

- 1 The members, purpose and objectives of your team.
- 2 The work required of your team.
- 3 The available resources for undertaking the required work.
- 4 The organisation's written health and safety policy statement and associated information and requirements.
- 5 Your team's plan for undertaking the required work.
- 6 The skills, knowledge and understanding, experience and workloads of team members.
- 7 Your organisation's policy and procedures in terms of personal development.
- 8 Reporting lines in the organisation and the limits of your authority.
- 9 Organisational standards or levels of expected performance.
- 10 Organisational policies and procedures for dealing with poor performance.
- 11 Organisational grievance and disciplinary policies and procedures.
- 12 Organisational performance appraisal systems.

### Evidence Requirements

*To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria, behaviours and Knowledge and Understanding.*

The following table provides you with possible examples of evidence.

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### Evidence Requirements

PC	Evidence of Performance Criteria: ◆ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
	<b>Records of work allocation to your team and its members</b>				
PC1	◆ notes of meetings with your manager, schedules and other documents recording the work required from your team, and any priorities	7, 8	2, 3, 4, 5, 11	1	1, 2, 3, 4
PC2	◆ detailed work schedules, timetables and other plans for individual and team work activities, tasks, production targets or other ways of defining workloads	2, 3, 5, 7, 8, 10	3, 4, 5, 11	1, 2	1, 2, 3, 4, 5, 6, 8, 9
PC3	◆ notes of team briefings to allocate individual and team work activities, tasks, targets, etc	1, 2, 3, 4, 5, 6, 7, 9	1, 5, 6, 7, 9, 11	1, 2	1, 2, 3, 4, 5, 6, 7,
PC4	◆ personal statements (reflections on the process and reasoning behind work allocation, including work priorities, availability of resources, and the relative abilities and development needs of team members)	3, 5, 7, 8, 10	3, 4, 5, 6, 11	1, 2	1, 2, 3, 4, 5, 6, 7, 8, 9
PC5	◆ witness statements (comments on the process of work allocation and perceptions of its fairness, appropriateness and clarity)	1, 4, 5, 6, 9	-	-	-
PC6					
	<b>Records of the quality and quantity of the team's output</b>				
PC5	◆ records of the monitoring of work output/production for quality, consistency with specifications, etc (eg quality control charts, etc) that you have collected	2, 5, 7, 8	1, 8, 9, 12, 13,	1	1, 2, 3, 4.
PC6	◆ records of individual and team work output or production records, production/operational reports that you have prepared, etc	2, 5, 7, 8	1, 8, 9, 12, 13,	1, 2	1, 2, 3, 4, 5, 6, 8
PC7	◆ notes, reports, recommendations to managers or other records of problems or critical incidents and action you have taken in relation to supplied materials; equipment, vehicles or facilities;	4, 5, 7, 8	4, 8, 12, 13	1	1, 2, 3, 5, 6, 7, 8, 9, 10, 11, 12
PC8	product/service quality; health, safety or security; customers; or team members' work performance (including issues requiring disciplinary action, and training or coaching activity you have undertaken)				
PC9	◆ notes, emails, memos or other records of formal or informal feedback or performance appraisal of team members	2, 5, 9	1, 6, 7, 8, 9, 10, 13	1, 2	1, 2, 5, 6, 7, 8, 9, 10, 11, 12
PC10	◆ personal statement (reflections on your own role in dealing with problems or critical incidents affecting the team and its performance, and how you encourage the team and individual members to work to the best of their ability to achieve or exceed targets for quality and quantity of products or services)	1, 2, 3, 4, 5, 6, 7, 8, 9	4, 8, 12, 13	1, 2	1, 2, 5, 6, 7, 8, 9, 10, 11, 12
PC11	◆ witness statements (comments on your own role in dealing with problems or critical incidents affecting the team and its performance, and how you encourage the team and individual members to work to the best of their ability to achieve or exceed targets for quality and quantity of products or services)	1, 2, 4, 5, 6, 9	-	-	-
PC12					
PC13					





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**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Internal verifier's signature** \_\_\_\_\_ **Date** \_\_\_\_\_