



F7G2 04 – Maintain working relationships and oversee work activities

This Unit comprises of the following
National Occupational Standards (NOS)

SUMMES3 (SQA Unit Code - F7G2 04)

Maintain effective working relationships



Overview

This unit identifies the competences needed to contribute to the development and maintenance of positive working relationships with other people, in accordance with organisational requirements. It is about being positive and constructive in dealings with others, keeping others informed about work plans and activities that affect them by using effective communication skills.

This unit covers the responsibilities required to comply with any policies of the organisation such as contributing to and maintaining positive working relationships with other people.

The person carrying out this work should know how they can develop and maintain positive working relationships with relevant people and understand the importance of appearance and behaviour, the feelings and expectations of others, including customers, and effective communications.

SUMMES3 (SQA Unit Code - F7G2 04)

Maintain effective working relationships

Performance criteria

- You must be able to:*
- P1 establish and maintain productive working relationships with relevant people, including dealing with disagreements in an amicable and constructive way, so that good relationships are maintained
 - P2 identify and confirm the needs and expectations of their colleagues and, where appropriate, customers
 - P3 greet others in an appropriate way that makes them feel valued and respected
 - P4 keep others informed about work plans or activities which affect them or their work
 - P5 respond effectively to requests for job information from relevant people
 - P6 seek assistance from others in a polite and courteous way without causing undue disruption to normal working activities
 - P7 respond promptly and willingly when others ask for help or information which fall within the limits of their own job responsibilities and capabilities, referring to the appropriate person when requests for assistance fall outside their area of responsibility
 - P8 where appropriate, contribute actively to effective team working by co-operating with colleagues, using appropriate methods of communication
 - P9 identify conflicts which may cause problems to productivity and promptly seek solutions from the responsible person
 - P10 meet their organisations standards for appearance and behaviour

SUMMES3 (SQA Unit Code - F7G2 04)

Maintain effective working relationships

Knowledge and understanding

You need to know and understand:

- K1 legislation regarding health and safety, data protection, equal opportunities and regulations that affect the way that products and services are delivered to customers
- K2 industrial, organisational and professional codes of practice and ethical standards that apply
- K3 the actions that are necessary to begin, develop and maintain good working relationships
- K4 the principles of good working relationships, reasons why working relationships may break down and the action to take to resolve this
- K5 the importance of developing positive working relationships with relevant people and maintaining productivity – the effect on morale, productivity and company image
- K6 how to deal with problems that could have an adverse effect on relationships
- K7 how to respond to those with physical disabilities, learning difficulties and language differences (including dialects and accents)
- K8 their organisation's standards for appearance and behaviour
- K9 their customers' rights including any contractual agreements they have with their organisation
- K10 the limits of their own authority, and when they need to seek agreement or permission from others, the roles and responsibilities of different individuals and the management structures within different organisations employing labour
- K11 any organisational targets relevant to their job, their role in meeting them, and the consequences for their organisation if those targets are not met
- K12 how to communicate in a clear, polite, confident way, why this is important and the lines of communication that are available to them
- K13 the importance of considering and accepting the views and opinions of other people
- K14 the implications for their work and organisation of their own actions
- K15 the implications for their organisation of not being able to communicate effectively with others, including customers
- K16 the types of job information that may be required by others in the workplace, including, where relevant, the need to keep colleagues informed about their work when it might impact on theirs
- K17 how to use the key principles of good communication in work situations, including methods of confirming that the communication has been understood

SUMMES3 (SQA Unit Code - F7G2 04)

Maintain effective working relationships

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Status Original

Originating organisation SummitSkills

Original URN M3

Relevant occupations Building and construction; Skilled Trades Occupations

Suite Mechanical Engineering Services

Key words positive, constructive, informed

SUMMES4 (SQA Unit Code - F7G2 04)

Provide relevant people with technical and functional information



Overview

This unit is for people who pass on technical or functional information relating to equipment and components on which they have been working. It is about supplying technical and functional information accurately on appropriate occasions or at handover with the right amount of detail, bearing in mind the level of awareness of the person receiving the information.

It is about identifying who should receive such information, at what level of detail.

It requires that the person carrying out the work complies with, and works within, the policies and procedures of their organisation, and reports any problems to an appropriate person, seeking guidance and instructions from others when necessary.

This unit is about understanding the equipment and/or components and their operation to a depth adequate for carrying out effective familiarisation and demonstration procedures to the required standard.

It includes understanding the needs of a customer and assessing the customer's ability to operate the product. It is important that, where relevant, any Health & Safety aspects are explained to the customer, both for their own protection and for the safe operation of the equipment or components including how to isolate the equipment in the case of emergency and the appropriate contact details should they need further advice or help.

SUMMES4 (SQA Unit Code - F7G2 04)

Provide relevant people with technical and functional information

Performance criteria

- You must be able to:*
- P1 identify the relevant people, such as customers, that need to be supplied with technical and functional information and ensure they have any other necessary information, such as safety information, how to isolate the product in case of emergency and the person's address or contact details for further advice or help
 - P2 discuss, with the relevant people, the information they need in order for the systems, equipment or components to be operated safely and effectively
 - P3 obtain from appropriate sources current and relevant information required for the work
 - P4 pass on information in a timely, courteous and professional manner and in accordance with organisational procedures
 - P5 confirm that the supplied product or equipment is the correct one or suitable for the purpose, working to its given specifications, meets the customers expectations and meets all the required safety standards
 - P6 where relevant, explain and demonstrate the operation of the product to the customer
 - P7 where relevant, ensure that the customer is able to operate the product and is aware of the necessary health and safety information and advice
 - P8 clearly identify any unusual features of the condition of the system, equipment or component
 - P9 where necessary, confirm that relevant people involved accept that the system or equipment is in a satisfactory condition for handover to take place

SUMMES4 (SQA Unit Code - F7G2 04)

Provide relevant people with technical and functional information

Knowledge and understanding

You need to know and understand:

- K1 sources of technical and functional information such as the manufacturer, supplier or own organisation
- K2 responsibilities and limitations in their job role with respect to supplying technical and functional information
- K3 the technical and functional information that they are providing and its implications for the operation of equipment and components
- K4 the organisational policy regarding the handover and demonstration of a product or equipment
- K5 where appropriate, customer relations methods and procedures
- K6 work site requirements (e.g. structural, services and ventilation)
- K7 product or equipment operation, controls, settings and adjustments
- K8 waste disposal procedures at the work site
- K9 alternative systems or equipment that could be more appropriate to the relevant person's needs
- K10 which situations warrant written technical and functional information
- K11 the importance of providing information clearly, courteously and professionally
- K12 the safety implications and functional consequences of supplying inaccurate or incomplete information to the relevant person
- K13 methods of checking the relevant person's understanding of the technical and non-technical information provided, including Health & Safety information
- K14 where necessary, the organisational procedures for confirming and recording handover

SUMMES4 (SQA Unit Code - F7G2 04)

Provide relevant people with technical and functional information

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Original URN M4

Relevant occupations Building and construction; Skilled Trades Occupations

Suite Mechanical Engineering Services

Key words Supplying technical and functional information accurately

SUMMES5 (SQA Unit Code - F7G2 04)

Oversee the work environment



Overview

This unit is about overseeing the work environment, which in some cases might involve overseeing the work of other operatives and/or contractors. The person carrying out this work is responsible for ensuring that the work is effectively coordinated in order to complete the work on time and to the specification.

The person carrying out this work should know the extent of their role and responsibilities, including understanding how best to motivate and communicate with others.

SUMMES5 (SQA Unit Code - F7G2 04)

Oversee the work environment

Performance criteria

- You must be able to:*
- P1 produce a risk assessment and method statement for the work to be carried out
 - P2 ensure the risk assessment and method statement includes others working in the area including work colleagues and any other operatives
 - P3 where appropriate, allocate duties and responsibilities to operatives to make best use of their competence
 - P4 where relevant, instruct the operatives about their duties and responsibilities clearly and concisely
 - P5 ensure that all their communications are clear, accurate and appropriate to the situation
 - P6 where relevant, ensure effective co-ordination with the work of other contractors
 - P7 where relevant, monitor that the work of operatives is in accordance with working practices and is:
 - P7.1 safe and fit for purpose
 - P7.2 cost-effective
 - P7.3 within the programme of work and complies with industry standards
 - P8 ensure that safe and appropriate action is taken promptly where a non-compliance is identified during the programme of work
 - P9 ensure that all documentation is in accordance with the operations and organisational requirements and is legible, accurate and timely
 - P10 liaise with the responsible person to resolve issues which are outside the scope of their job role
 - P11 ensure that the work on completion is safe, complies with both the work specification and industry standards

SUMMES5 (SQA Unit Code - F7G2 04)

Oversee the work environment

Knowledge and understanding

You need to know and understand:

- K1 their role and responsibilities (e.g. Health and Safety) towards other staff, employer, customers, any sub-contractors and, where appropriate, when supervising others
- K2 safety requirements with regard to others and their ability to re-schedule work to co-ordinate with their requirements
- K3 how to interpret a risk assessment, apply a method statement, and monitor changing conditions in the workplace
- K4 different styles of supervision, how to best motivate others and, where appropriate, oversee the work of operatives for whom they are responsible
- K5 where relevant, how to identify the competence of the operatives for whom they are responsible
- K6 where relevant, how to plan the work allocations, duties and responsibilities of operatives for whom they are responsible
- K7 how to communicate with others including operatives and, where appropriate, other staff, employer, customers and any sub-contractors
- K8 how to be effective when communicating with and responding to others
- K9 the scope for carrying out the work whilst maintaining safety, cost effectiveness and remaining within the programme of work
- K10 the relevant industry standards for work carried out in operations
- K11 organisational requirements for completing the necessary documentation and how to ensure clarity, accuracy and completion within schedule
- K12 how to identify that the operation on completion is safe and complies with industry standards

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Relevant occupations Building and construction; Skilled Trades Occupations

Suite Mechanical Engineering Services

Key words oversee, coordinate

SUMMES6 (SQA Unit Code - F7G2 04)

Organise the working environment



Overview

This unit is about managing the working environment. It involves discussing with the relevant people a programme of work and estimating the amount of time the work should take to complete.

The person carrying out the work should identify and organise the appropriate resources for the work to be carried out, including identifying suitable alternatives when the most appropriate resources are not available. It also involves ensuring that equipment and components are in a condition fit for the installation or maintenance to be carried out.

This unit also covers ensuring that work is carried out safely and in accordance with the programme of work and industry standards, and making sure that all relevant documentation is completed accurately.

SUMMES6 (SQA Unit Code - F7G2 04)

Organise the working environment

Performance criteria

- You must be able to:*
- P1 identify from the work specification what resources (such as materials, plant, vehicles or equipment) are required in order to carry out the work efficiently and, where necessary, identify suitable alternatives
 - P2 discuss and agree a programme of work which includes, where necessary, effective co- ordination with the work of other contractors and make an accurate estimate of the time the job should take to complete
 - P3 ensure that all their communications are clear, accurate and appropriate to the situation
 - P4 confirm that the required amount and type of materials are available for work to commence and be completed cost effectively
 - P5 ensure that all resources are delivered on time and undamaged by transportation
 - P6 where appropriate, ensure that there is sufficient and appropriate provision for the safe storage of materials and equipment in the work location
 - P7 ensure that all documentation is completed in accordance with the operations and organisational requirements and is legible, accurate and timely
 - P8 liaise with the responsible person to resolve issues which are outside the scope of their job role
 - P9 ensure that the work on completion is safe, complies with both the work specification and industry standards

SUMMES6 (SQA Unit Code - F7G2 04)

Organise the working environment

Knowledge and understanding

You need to know and understand:

- K1 their responsibilities to their employer and to their customer
- K2 the scope, purpose and requirements of the work operations with which they are involved and for which they are responsible
- K3 how to interpret a method statement, a risk assessment and monitor changing conditions in the workplace
- K4 how to interpret the work specification to identify the required resources (such as materials, plant, vehicles or equipment)
- K5 how to estimate the amount of time for completion of the work and the factors to take into account
- K6 how to identify and agree a programme of work from the work specification
- K7 how to communicate with others clearly and concisely
- K8 the material schedule and how to confirm they have the right type and quantity for work to commence and be completed cost-efficiently
- K9 suitable alternative resources (such as tools, materials, equipment and components)
- K10 the transport and storage requirements for all materials and how to manage the available storage in the work location
- K11 organisational requirements for completing the necessary documentation and how to ensure clarity, accuracy and completion within schedule
- K12 the relevant industry standards for work carried out in operations
- K13 the scope for carrying out the work whilst maintaining safety, cost effectiveness and remaining within the programme of work
- K14 the possible consequences of not carrying out the work within the estimated time and to the programme of work
- K15 their job role and its scope and when to involve someone with higher responsibilities
- K16 how to identify that the operation on completion is safe and complies with industry standards

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Organise the working environment

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