

### **About this Unit**

This standard relates to proposals and recommendations for effective use of physical resources and may include the use of staff, equipment, facilities, supplies etc either for a discrete project or as part of annual or ongoing budget setting and development.

Users of this standard will need to ensure that practice reflects up to date information and policies.

Your **knowledge and understanding** will be specifically related to legal requirements and codes of practice and conduct applicable to your job, and the NHS Knowledge and Skills Framework. This will relate to your work activities; the job you are doing, and the setting, eg in hospital and community, domiciliary, residential care, and the individuals you are working with.

**Values** — the values underpinning this Unit are embedded within the 2009 NHS Code of Conduct for Health Care Support Workers. These are stated in full within the Assessment Strategy and Guidance document for the awards.

**Key Words and Concepts** — a glossary of definitions, key words and concepts used in this Unit is contained in the Assessment Strategy and Guidance document.

In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way. **You should read the Assessment Strategy and Guidance document before you begin working with the standards and refer to it if you are unsure about anything in the Unit.**

**Specific Evidence Requirements for the Unit**

**It is essential that you adhere to the Evidence Requirements for this Unit**

<b>SPECIFIC EVIDENCE REQUIREMENTS FOR THIS UNIT</b>
<b>Simulation:</b>
<ul style="list-style-type: none"> <li>◆ Simulation is <b>NOT</b> permitted for any part of this Unit.</li> <li>◆ <b>The following forms of evidence ARE mandatory:</b></li> <li>◆ <b>Direct Observation:</b> Your assessor or expert witness must observe you in real work activities. Their confirmation of your practice will provide evidence for a significant amount of the performance criteria in this Unit. <b>For example</b>, how you involve stakeholders in the process from provide opportunities through to providing information on decisions taken.</li> <li>◆ <b>Professional discussion:</b> Describes your actions in a particular situation and reflect on the reason(s) why you practice that way. <b>For example</b>, how you ensure your proposals include all relevant data and how you present the proposal</li> </ul>
<b>Competence of performance and knowledge could also be demonstrated using a variety of evidence from the following:</b>
<ul style="list-style-type: none"> <li>◆ <b>Reflective Account:</b> These are written pieces of work which allow you to reflect on the course of action you took in a specific situation to identify any learning from the piece of work and to describe what you might do differently in the light of your new knowledge.</li> <li>◆ <b>Questioning/professional discussion:</b> May be used to provide evidence of knowledge, legislation, policies and procedures which cannot be fully evidenced through direct observation or reflective accounts. In addition your assessor/mentor or expert witness may also ask questions to clarify aspects of your practice.</li> <li>◆ <b>Expert Witness:</b> A designated expert witness, eg a senior member of staff, may provide a direct observation of your practice, or record a professional discussion they have held with you on a specific piece of practice.</li> <li>◆ <b>Witness Testimony:</b> Can be a confirmation or authentication of the activities described in your evidence which your assessor or mentor has not seen.</li> <li>◆ <b>Products:</b> These can be any record that you would normally use within your normal role, eg you should not put confidential records in your portfolio; they can remain where they are normally stored and be checked by your assessor and internal verifier.</li> <li>◆ <b>Prior Learning:</b> You may be able to use recorded prior learning from a course of training you have attended within the last two years. Discussion on the relevance of this should form part of your assessment plan for each Unit.</li> <li>◆ <b>Simulation:</b> There may be times when you have to demonstrate you are competent in a situation that does not arise naturally through your work role, eg dealing with violent or abusive behaviour. The Evidence Requirements in each Unit provide specific guidance regarding the use of simulation.</li> </ul>
<b>GENERAL GUIDANCE</b>
<ul style="list-style-type: none"> <li>◆ Prior to commencing this Unit you should agree and complete an assessment plan with your assessor which details the assessment methods you will be using, and the tasks you will be undertaking to demonstrate your competence.</li> <li>◆ Evidence must be provided for ALL of the performance criteria, ALL of the knowledge.</li> <li>◆ The evidence must reflect the policies and procedures of your workplace and be linked to current legislation, values and the principles of best practice within the Health Care sector. This will include the National Service Standards for your areas of work.</li> <li>◆ All evidence must relate to your own work practice.</li> </ul>

**KNOWLEDGE SPECIFICATION FOR 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 expectations and requirements of your job role.**

**You need to provide evidence for ALL knowledge points listed below. There are a variety of ways this can be achieved so it is essential that you read the ‘knowledge evidence’ section of the Assessment Guidance.**

<b>You need to show that you know, understand and can apply in practice:</b>	<b>Enter Evidence Numbers</b>
1 The physical resources needed to carry out activities effectively.	
2 How to carry out cost-benefit analyses with regard to proposed expenditure.	
3 How to identify and evaluate alternative options to proposals on expenditure.	
4 How to develop and argue an effective case for expenditure.	
5 The trends and developments which may influence future expenditure and how to forecast and plan for these.	
6 The procedures which need to be followed to make recommendations for expenditure.	
7 The importance of effective budgetary control to team and organisational efficiency, and your role and responsibilities in relation to this.	
8 The principles and methods which underpin effective budgetary control.	
9 The importance of keeping accurate records of past expenditure.	
10 The information needed to make decisions on expenditure and how to gather and check the validity of this information.	
11 How to decide on targets, standards and monitoring methods.	
12 The trends and developments which might influence future expenditure.	
13 How to collect and validate information required to evaluate a case for expenditure.	
14 The types of information required to make decisions on expenditure.	
15 The organisational objectives and strategies relevant to the programmes of work.	
16 The importance of gaining agreement to budgets.	
17 How to carry out budget negotiations.	
18 Areas of uncertainty and disagreement which may occur when agreeing budgets and how to resolve these in a way which is satisfactory to those involved in the decision-making process.	

**FN9D 04 (GEN 65) Make recommendations for the use of physical resources**

Performance Criteria		DO	RA	EW	Q	P	WT	PD
		1	Provide opportunities for relevant stakeholders to make suggestions for future expenditure.					
2	Ensure your proposals take account of past experience, trends and developments.							
3	Base recommendations on an accurate interpretation of valid data and a realistic evaluation of risk.							
4	Include other factors likely to affect future expenditure.							
5	Clearly and concisely state the expected benefits, the costs involved and any potential negative consequences.							
6	Consider alternative options for expenditure and provide valid reasons why you have rejected them.							
7	Provide sufficient, valid information for relevant people to make a decision on your proposals.							
8	Remain consistent with the organisation's plans and objectives.							
9	Include targets, standards and monitoring methods.							
10	Provide a financial justification and sufficient, valid information to allow your proposals to be evaluated realistically.							
11	Present proposals to relevant stakeholders in an appropriate format and at an appropriate time.							
12	Negotiate proposals in a way which maintains good relationships with the people involved.							
13	Clarify and resolve any areas of uncertainty and disagreement over the proposals.							
14	Complete negotiations within agreed timescales.							
15	Provide relevant stakeholders with accurate information on decisions in a manner and at a time, which is likely to ensure their co-operation and confidence.							

DO = Direct Observation  
 EW = Expert Witness  
 PD = Professional Discussion

RA = Reflective Account  
 P = Product (Work)

Q = Questions  
 WT = Witness Testimony

*To be completed by the candidate*

**I SUBMIT THIS AS A COMPLETE UNIT**

Candidate's name: .....

Candidate's signature: .....

Date: .....

*To be completed by the assessor*

*It is a shared responsibility of both the candidate and assessor to claim evidence, however, it is the responsibility of the assessor to ensure the accuracy/validity of each evidence claim and make the final decision.*

**I CERTIFY THAT SUFFICIENT EVIDENCE HAS BEEN PRODUCED TO MEET ALL THE ELEMENTS, PCS AND KNOWLEDGE OF THIS UNIT.**

Assessor's name: .....

Assessor's signature: .....

Date: .....

**Assessor/Internal verifier feedback**

*To be completed by the internal verifier if applicable*

***This section only needs to be completed if the Unit is sampled by the internal verifier***

Internal verifier's name: .....

Internal verifier's signature: .....

Date: .....